

U.S. Department of Education
Washington, D.C. 20202-5335

APPLICATION FOR GRANTS
UNDER THE

84-283B-1 FY24 Comprehensive Centers Program

CFDA # 84.283B

PR/Award # S283B240076

Grants.gov Tracking#: GRANT14194533

OMB No. , Expiration Date:

Closing Date: Jun 24, 2024

PR/Award # S283B240076

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Application for Federal Assistance SF-424

* 1. Type of Submission:

- ☐ Preapplication
☒ Application
☐ Changed/Corrected Application

* 2. Type of Application:

- ☒ New
☐ Continuation
☐ Revision

* If Revision, select appropriate letter(s):

* Other (Specify):

* 3. Date Received:

06/24/2024

4. Applicant Identifier:

5a. Federal Entity Identifier:

93-0553346

5b. Federal Award Identifier:

State Use Only:

6. Date Received by State:

7. State Application Identifier:

Oregon

8. APPLICANT INFORMATION:

* a. Legal Name:

Education Northwest

* b. Employer/Taxpayer Identification Number (EIN/TIN):

93-0553346

* c. UEI:

XJA8AWALTC16

d. Address:

* Street1:

1417 NW Everett Street, Suite 310

Street2:

* City:

Portland

County/Parish:

Multnomah

* State:

OR: Oregon

Province:

* Country:

USA: UNITED STATES

* Zip / Postal Code:

97209-2653

e. Organizational Unit:

Department Name:

Division Name:

f. Name and contact information of person to be contacted on matters involving this application:

Prefix:

* First Name:

Jessica

Middle Name:

* Last Name:

Johnson

Suffix:

Title: Chief Executive Officer

Organizational Affiliation:

Education Northwest

* Telephone Number:

15032759500

Fax Number:

* Email:

Jessica.Johnson@ednw.org

PR/Award # S283B240076

Page e3

ED 001282

Application for Federal Assistance SF-424*** 9. Type of Applicant 1: Select Applicant Type:**

M: Nonprofit with 501C3 IRS Status (Other than Institution of Higher Education)

Type of Applicant 2: Select Applicant Type:

Type of Applicant 3: Select Applicant Type:

* Other (specify):

*** 10. Name of Federal Agency:**

Department of Education

11. Catalog of Federal Domestic Assistance Number:

84.283

CFDA Title:

Comprehensive Centers

*** 12. Funding Opportunity Number:**

ED-GRANTS-051324-001

* Title:

Office of Elementary and Secondary Education (OESE): Program and Grantee Support Services:
Comprehensive Centers Program, Assistance Listing Number 84.283B**13. Competition Identification Number:**

84-283B2024-1

Title:

84-283B-1 FY24 Comprehensive Centers Program

14. Areas Affected by Project (Cities, Counties, States, etc.):

Add Attachment

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*** 15. Descriptive Title of Applicant's Project:**

Region 11 Comprehensive Center

Attach supporting documents as specified in agency instructions.

Add Attachments

Delete Attachments

View Attachments

Application for Federal Assistance SF-424**16. Congressional Districts Of:*** a. Applicant * b. Program/Project

Attach an additional list of Program/Project Congressional Districts if needed.

17. Proposed Project:* a. Start Date: * b. End Date: **18. Estimated Funding (\$):**

* a. Federal	<input type="text" value="3,057,651.00"/>
* b. Applicant	<input type="text" value="0.00"/>
* c. State	<input type="text" value="0.00"/>
* d. Local	<input type="text" value="0.00"/>
* e. Other	<input type="text" value="0.00"/>
* f. Program Income	<input type="text" value="0.00"/>
* g. TOTAL	<input type="text" value="3,057,651.00"/>

*** 19. Is Application Subject to Review By State Under Executive Order 12372 Process?**

- ☐ a. This application was made available to the State under the Executive Order 12372 Process for review on
- ☐ b. Program is subject to E.O. 12372 but has not been selected by the State for review.
- ☒ c. Program is not covered by E.O. 12372.

*** 20. Is the Applicant Delinquent On Any Federal Debt? (If "Yes," provide explanation in attachment.)**

☐ Yes ☒ No

If "Yes", provide explanation and attach

21. *By signing this application, I certify (1) to the statements contained in the list of certifications and (2) that the statements herein are true, complete and accurate to the best of my knowledge. I also provide the required assurances** and agree to comply with any resulting terms if I accept an award. I am aware that any false, fictitious, or fraudulent statements or claims may subject me to criminal, civil, or administrative penalties. (U.S. Code, Title 18, Section 1001)**

☒ ** I AGREE

** The list of certifications and assurances, or an internet site where you may obtain this list, is contained in the announcement or agency specific instructions.

Authorized Representative:

Prefix: * First Name:

Middle Name:

* Last Name:

Suffix:

* Title: * Telephone Number: Fax Number: * Email: * Signature of Authorized Representative: * Date Signed:

Congressional Districts Served

AK-all

ID-all

MT-all

OR-all

WA-all

CERTIFICATION REGARDING LOBBYING

Certification for Contracts, Grants, Loans, and Cooperative Agreements

The undersigned certifies, to the best of his or her knowledge and belief, that:

(1) No Federal appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of an agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any Federal contract, the making of any Federal grant, the making of any Federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any Federal contract, grant, loan, or cooperative agreement.

(2) If any funds other than Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this Federal contract, grant, loan, or cooperative agreement, the undersigned shall complete and submit Standard Form-LLL, "Disclosure of Lobbying Activities," in accordance with its instructions.

(3) The undersigned shall require that the language of this certification be included in the award documents for all subawards at all tiers (including subcontracts, subgrants, and contracts under grants, loans, and cooperative agreements) and that all subrecipients shall certify and disclose accordingly. This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering into this transaction imposed by section 1352, title 31, U.S. Code. Any person who fails to file the required certification shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

Statement for Loan Guarantees and Loan Insurance

The undersigned states, to the best of his or her knowledge and belief, that:

If any funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this commitment providing for the United States to insure or guarantee a loan, the undersigned shall complete and submit Standard Form-LLL, "Disclosure of Lobbying Activities," in accordance with its instructions. Submission of this statement is a prerequisite for making or entering into this transaction imposed by section 1352, title 31, U.S. Code. Any person who fails to file the required statement shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

*** APPLICANT'S ORGANIZATION**

Education Northwest

*** PRINTED NAME AND TITLE OF AUTHORIZED REPRESENTATIVE**Prefix: * First Name: Nicky Middle Name: * Last Name: Martin Suffix:

* Title: Director

* SIGNATURE: Nicky Martin

* DATE: 06/24/2024

Abstract

An abstract is to be submitted in accordance with the following:

1. Abstract Requirements

- Abstracts must not exceed one page and should use language that will be understood by a range of audiences.
- Abstracts must include the project title, goals, and expected outcomes and contributions related to research, policy, and practice.
- Abstracts must include the population(s) to be served.
- Abstracts must include primary activities to be performed by the recipient.
- Abstracts must include subrecipient activities that are known or specified at the time of application submission.

For research applications, abstracts also include the following:

- Theoretical and conceptual background of the study (i.e., prior research that the investigation builds upon and that provides a compelling rationale for this study).
- Research issues, hypotheses and questions being addressed.
- Study design including a brief description of the sample including sample size, methods, principals, and dependent, independent, and control variables, as well as the approach to data analysis.

[Note: For a non-electronic submission, include the name and address of your organization and the name, phone number and e-mail address of the contact person for this project.]

You may now Close the Form

You have attached 1 file to this page, no more files may be added. To add a different file, you must first delete the existing file.

* Attachment:

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U.S. Department of Education | Comprehensive Center Program (Region 11)

Education Northwest (EDNW), in collaboration with Child Trends, FHI 360, and Concord Evaluation Group, proposes to operate the Region 11 Comprehensive Center. This proposal addresses Absolute Priority 2: *Regional Centers*. For the Competitive Preference Priority: *Applications from New Potential Grantees*, this proposal includes two partners Child Trends and FHI360 who have never received awards through this competition.

The Center will provide intensive capacity-building support to improve academic opportunities and outcomes for students in Alaska, Idaho, Montana, Oregon, and Washington, with particular focus on underserved populations. Technical assistance will focus on carrying out consolidated state plans, implementing and sustaining evidence-based programs and practices, addressing unique obstacles of underserved populations, and improving the implementation of ESSA. Short-term outcomes include established structures, systems, policies, evidence-based practices, and high quality tools and products. Longer-term outcomes include changes in educational services, instruction, and student outcomes.

To achieve these goals, EDNW applies an equity lens and evidence-based TA approach—built and tested through our history of work in the region—to co-develop projects focused on the areas identified. Our approach begins with needs sensing, relationship building and co-planning, and progresses through collaborative implementation and continuous improvement and feedback cycles, sustaining and scaling the work. Six foundational principles—equity-centered, evidence-based, collaborative and responsive, priority focused, aligned, and adaptable—undergird the work. Proposed projects respond to the needs of the region including a cross-state Native education network, projects in literacy, educator shortages, intensive interventions with low performing schools, early kindergarten, and other priority topics.

The Center is led by a team with work experience, expertise and lived experiences as students, parents, and educators in the region which enhances the relevance of the work.

Project Narrative File(s)

* **Mandatory Project Narrative File Filename:**

Add Mandatory Project Narrative File

Delete Mandatory Project Narrative File

View Mandatory Project Narrative File

To add more Project Narrative File attachments, please use the attachment buttons below.

Add Optional Project Narrative File

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PROPOSAL SUBMITTED IN RESPONSE TO
U.S. Department of Education

Comprehensive Centers Program: Region 11

June 24, 2024

Proprietary and business confidential information contained in this proposal shall not be used or disclosed, except for evaluation purposes or as otherwise required to administer the procurement process. Provided that, if a contract is awarded to this offer as a result of or in connection with the submission of this proposal, the Contractor shall have the right to use or disclose this information to the extent provided in the contract. This restriction does not limit the Contractor's right to use or disclose information obtained from another source without restriction.

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INTRODUCTION

Education Northwest (EDNW), in collaboration with Child Trends, FHI 360, and Concord Evaluation Group, proposes to operate the Region 11 Comprehensive Center (R11CC) by providing intensive capacity-building support to improve academic opportunities and outcomes for students in Alaska, Idaho, Montana, Oregon, and Washington. The four operating partners represent a complementary, diverse team with decades of experience working with schools, districts, and states to continuously improve education systems, particularly for our highest-need and most underserved students in Region 11. EDNW brings project leadership; deep research and technical assistance (TA) capabilities and experience, primarily applied in the Northwest region; and operational capacity grounded in more than five decades of successful federal contract and grant management. Child Trends contributes needs-sensing, research, and capacity-building expertise in key content areas including educator workforce development, early learning, and supporting populations with specific learning needs. For example, Child Trends has unique, specialized expertise working with children and youth who are considered at risk, neglected, or delinquent from their experience co-operating the National Technical Assistance Center for the Education of Neglected or Delinquent Children & Youth.¹ FHI 360 brings expertise and innovation in stakeholder engagement, communication, and coordinated dissemination and outreach to address the full range of R11CC's stakeholder engagement, needs-sensing, and communications needs. Finally, Concord Evaluation Group has 34 years of experience, including evaluating regional Comprehensive Centers (CCs) and conducting Center-level evaluation and data collection for the past five years.

¹ <https://neglected-delinquent.ed.gov/>

EDNW has a unique and significant commitment to Region 11. Our organization was founded in 1966 specifically to serve Alaska, Idaho, Montana, Oregon, and Washington as the Regional Educational Laboratory (REL) Northwest. Over the past 58 years, we have worked continuously with these five states through federal Centers as well as numerous state and local projects, evolving our services in response to their shifting priorities and increasingly diverse student populations. In addition to operating REL Northwest for 55 years, EDNW has operated CCs in the region since their inception in 2005. Through these projects we have worked with state chiefs and other agency leaders in all five states on critical challenges, such as addressing educator shortages, supporting multilingual learners, addressing students' social-emotional and mental health, improving high school graduation outcomes, and promoting effective pathways to postsecondary education and careers, to name just a few. Many of these projects are discussed throughout this proposal. We are intimately familiar with the region and understand its culture, its character, and the people who work across local, state, and Tribal education systems—not only because of our work but also because we live in these communities and call them home.

Our work has expanded across the country in recent years, yet we maintain strong ties to our regional roots: EDNW currently operates the Region 17 CC serving Idaho and Montana, and we maintain numerous direct capacity-building and TA partnerships with state education agencies (SEAs) as well as local education agencies (LEAs), Tribes, districts, schools, and other education and support providers across Region 11. Today, EDNW is implementing over 70 projects in the region at a scale of approximately \$11 million annual revenue. Our work yields measurable improvements in SEA capacity to develop, implement, support, and monitor the implementation of evidence-based practices to support systemic change, ultimately driving improved outcomes for teachers and students.

State and local educational systems are at an inflection point. Four years after the pandemic first interrupted education, we see signs of improvement and promise—but also many areas of continued need and support for students. In Region 11, all five states continue to struggle with significant post-pandemic learning gaps among all students, high levels of chronic absenteeism, critical educator shortages, and large reductions in rates of college-going among graduating students (Edge, 2024; Fahle et al., 2024; Rasanen, 2024). Furthermore, states and districts are still learning which evidence-based approaches can address learning recovery needs in their contexts while the September deadline for using Elementary and Secondary School Emergency Relief (ESSER) funds quickly approaches. Regional Centers are uniquely tasked to assist states in carrying out Elementary and Secondary Education Act (ESEA) plans, implement and scale evidence-based practices, address educational obstacles for underserved students, and improve implementation of ESEA programs.

EDNW and our operating partners understand firsthand how the CC system can help state, regional, and local education agencies in Alaska, Idaho, Montana, Oregon, and Washington improve educational opportunities and outcomes, close achievement gaps, and improve the quality of instruction for all students, particularly those with the greatest need. Because we have implemented this work successfully for decades, we bring deep relationships, strong contextual understanding, an experienced staff, and an equity-focused approach that works in the regional context.

EDNW is pleased to submit our proposal to operate the R11CC. Our proposal includes several distinguishing features, elaborated with evidence throughout the proposal (table 1).

Table 1. Key Features of the EDNW Proposal**Approach**

An equity-focused, evidence-based approach proven to bring about change. EDNW applies our equity lens and evidence-based TA approach—built and tested on work in the region—to co-develop projects with our partners. Our unique approach ensures that marginalized voices contribute to selecting, adapting, and implementing evidence-based practices in a systemic and measured way, resulting in improved outcomes for SEAs, LEAs, and students. Section A1 outlines our four-phase approach along with our six foundational principles. Section A2 provides our response to the needs of the region with specific project descriptions.

Sections A1 and A2 cover Application Requirements for All Centers (ARAC) 1, 2, and 5; Application Requirements for Regional Centers (ARRC) 1; Program Requirements for All Centers (PRAC) 1 and 2; and Program Requirements for Regional Centers (PRRC) 2 and 4.

Project Design

A project design that reflects the best of old and new. We combine lessons learned from our 19 years operating CCs and 55 years operating REL Northwest with new approaches and feedback from our operating partners and clients to deliver and manage intensive services in the post-COVID world. Our design fosters effective performance, personnel, and partnerships through comprehensive performance management, seamless personnel and partner management, and frequent stakeholder engagement—aligned with REL and other partners to minimize state burden and maximize buy-in. Section B1 describes our approach to performance management, while B2 details our approach to engagement. B3 highlights our approach to personnel, and B4 outlines the national partnerships we will leverage to maximize access to resources and reduce burden.

Sections B1–B4 cover ARAC 6 & 7; PRAC 3 – 7 and 9; and PRRC 1 – 3, 5, and 6.

Subject Matter and Technical Expertise

An unmatched team with deep and diverse knowledge, relevant and recent experience, relationships, and lived experience in the region. Our team offers quick start-up; efficient yet thorough needs sensing; high-quality, nuanced implementation support; and skill engaging the right partners and stakeholders early and often, leading to lasting results. We bring deep knowledge of the local context, state and district needs, policy landscape, and historical inequities, as well as community assets we can leverage for effective, sustainable implementation. Our lived experiences as students, parents, and educators in the region enhance the relevance of our work. Section C1 highlights our subject matter expertise, and C2 highlights our demonstrated track record providing TA services.

Sections C1 and C2 cover ARAC 3 and 4; ARRC 2; and PRAC 8.

Longstanding deep and broad partnerships in the region and nationally. Our local, national, and subject matter expert partnerships bring additional credibility, insights, and guidance to complex state projects, positioning them for successful outcomes and scale-up regionally and nationally. We have built trusting relationships within and across Region 11—and across the nation—so we can strategically connect the states we serve to other states as well as experts in specific priority areas. Our partnerships span local and regional districts and Tribes to statewide associations, family engagement groups, and education collaboratives. Nationally, we have strong existing partnerships with the REL, National CC, and over 15 additional federal centers articulated in section B4. Our SMEs come from 13 additional organizations. Sections B4 and C3 highlight our focus on partnerships, which are evident in examples throughout the proposal.

Sections B4 and C3 on partnerships cover PRRC 1 and 5 - 7 and PRAC 7 and 8.

A. APPROACH TO CAPACITY BUILDING

EDNW’s approach is unique and best suited for Region 11 in two key ways. First, our approach (Section A1) prioritizes evidence and equity. A comprehensive evidence base from implementation science and systems change research guides our work, which is reinforced by 58 years of intensive TA experience with schools, local educational systems, and states in the Northwest. In addition, we leverage EDNW’s equity lens and our lived experience in the region to pursue educational equity for underserved students. Second, our proposed projects, developed in partnership with SEA teams (Section A2), target high-leverage areas of need, engage the right regional and national experts, and rely on tested approaches that achieve desired outcomes.

A1. APPROACH TO HIGH-QUALITY, USEFUL, AND RELEVANT CAPACITY-BUILDING SERVICES

Drawing on research and our field experience, we developed and honed a TA approach that guides our intensive capacity-building services to support clients and recipients in meeting goals and outcomes. This section includes our **four-phase approach** to capacity building; **six foundational principles** including equity that guide our approach; and a **detailed logic model** with descriptions of inputs, outputs, and outcomes.

Four-Phase Approach

EDNW’s intensive TA and capacity-building approach includes four phases: **1) build trusting relationships, assess, and co-develop; 2) collaboratively implement; 3) collaboratively engage in continuous improvement and feedback cycles; and 4) scale and sustain** (figure 1). The phases align with the U.S. Department of Education document “Using Evidence to Strengthen Educational Investments” (2023), which provides guidelines to assess local needs; select and implement evidence-based interventions that SEAs, LEAs, and schools

have the capacity to implement; support and evaluate interventions; and examine and reflect on the process and outcomes. Figure 1 illustrates the approach with our foundational principles.

Figure 1. EDNW’s Technical Assistance and Capacity-Building Approach

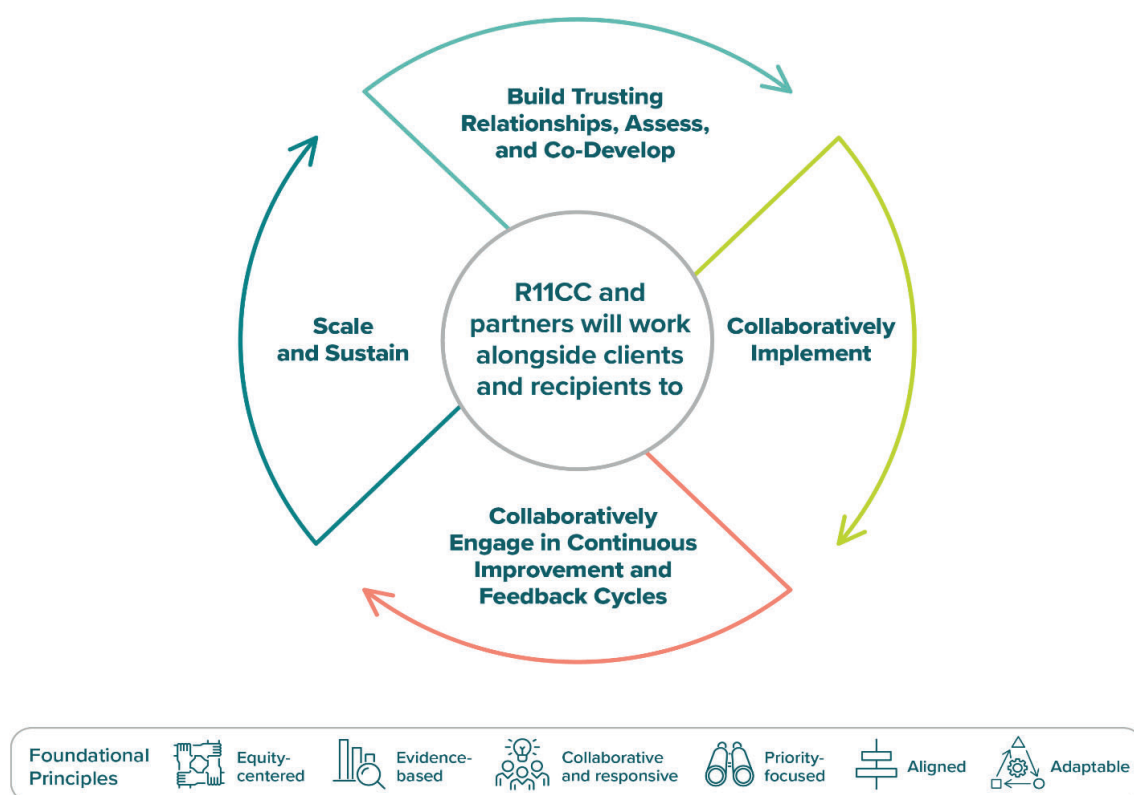


Table 2 elaborates on each phase, summarizing the research base and describing what it looks like in practice, particularly related to the tasks, activities, and requirements of a Regional Center. For example, in “Build Trusting Relationships, Assess, and Co-Develop” we discuss why trusting relationships are critical for capacity building and co-development and provide example activities we will pursue relevant to the R11CC scope of work, such as collaborating with REL Northwest for the needs assessment and working with the National CC, Content Centers, REL Northwest, and subject matter experts (SMEs), where relevant, to identify evidence-based practices to support and advance the work.

Table 2. Research Base and Key Activities for EDNW’s Technical Assistance Approach

Phase 1. Build Trusting Relationships, Assess, and Co-Develop	
Description and Research Base	Key Activities for Region 11 CC
<p>Trust is the cornerstone of effective partnerships. Partners trust each other to follow through and understand—even anticipate—each other’s needs and interests (Tseng et al., 2017).</p> <p>Collaborative planning: We assess capacity and readiness for change, identify targets, ensure client and recipient partners have the capacity to engage with support, and leverage local experience and expertise (Fixsen et al., 2015).</p> <p>Co-design: We listen to our client and recipient partners and use data, tools, and protocols to assess and understand their context, needs, and assets. We include members with lived experience to assess the contextual fit of proposed interventions and honor their expertise (Early Childhood Technical Assistance Center & The Center for IDEA Early Childhood Data Systems, 2023; Metz et al., 2021; Trohanis TA Projects, 2022). Together, we identify focal areas, define and organize support, and differentiate methods of capacity building.</p> <p>Co-develop: We co-develop plans to achieve shared goals, address unique obstacles of underserved students, and align with initiatives that have proven effective. Together, we review data to assess readiness and define indicators and measures of success. Co-designing guarantees that our work aligns with critical priorities and sustains state- and local-led approaches. This process results in clear priorities and realistic plans and timelines for implementation and evaluation.</p>	<ul style="list-style-type: none"> • Cultivate relationships with key staff members and partners • In collaboration with REL Northwest, identify and assess high-leverage needs, focal areas, and priorities, particularly related to ESEA plans, through surveys, meetings, web analytics, and regular feedback loops such as text surveys (see evaluation and stakeholder engagement sections) • Assess readiness and identify assets • In collaboration with SMEs, the National CC, Content Centers, and REL Northwest, identify evidence-based programs and practices that align to and complement existing initiatives and context to accelerate improvements in instruction and academic achievement • Co-develop plan, project logic model, design, and differentiated approach • Determine objectives, indicators/measures, and success benchmarks • Develop shared understanding of the unique educational obstacles faced by underserved populations and explore the best-suited evidence-based practices • Identify areas for improvement related to implementation of ESEA programs
<p>In practice → Oregon’s Higher Education Coordinating Commission and Educator Advancement Council require the state’s six public educator preparation programs (EPPs) to develop equity plans to recruit, retain, and graduate diverse educators. In 2023, the agencies asked EDNW to analyze the impact of the plans and facilitate an EPP community of practice (CoP). Early on, EDNW observed that lack of role clarity, expectations, and coherence was a barrier to implementation. EDNW facilitated alignment conversations to identify responsibilities and short-, medium-, and long-term outcomes for each partner. We collectively delineated agency roles to help EPPs meet state educator workforce goals. We then refocused the CoP and offered intensive coaching support on the realigned goals and guidance. EDNW and the agencies also modified the equity plan review process. As a result, the agencies collaborated to offer concrete guidance; consistent two-way communication; and a narrowed focus on concrete, measurable equity goals.</p>	

Phase 2. Collaboratively Implement

Description and Research Base	Key Activities for Region 11 CC
<p>Our approach leverages implementation science (Bauer et al., 2015) to increase states' abilities to use structures to support LEAs. We pay close attention to competency and organization as implementation drivers (National Implementation Research Network [NIRN], 2015) and we understand best practices across educational disciplines.</p> <p>We design a continuum of supports that achieves the highest level of engagement for sustained outcomes, then refine implementation practices (i.e., training, coaching, leadership supports and resources) based on data and feedback (NIRN, 2020). Clients and recipients are unlikely to accept our recommendations if our proposed innovations have no evidence base, cannot be easily implemented, or do not reflect local needs.</p> <p>Therefore, we convene implementation teams regularly to use data to critically examine and improve implementation (NIRN, 2015; Sahin, 2006).</p> <p>We work with other local and state programs and federal centers to combine and manage various sources of support and avoid disconnected, competing initiatives and programs. To this end, we collaborate to create efficient, comprehensive, and coherent systems of support that honor our client and recipient partners' priorities and needs.</p>	<ul style="list-style-type: none"> • Facilitate kick-offs, working groups, and task forces within and across regions • Establish and lead communities such as LinkedIn learning communities, in-person learning networks and peer-to-peer connections within and across regions • Field-test work across local programs to combine and manage sources of support, including other federal centers • Provide intensive training, coaching, leadership support, and subject matter expertise to support implementation of evidence-based practices • Provide other intensive project supports such as data analysis and systems change support • Co-develop and launch tools and deliverables to support implementation • Collect benchmark and implementation data

In practice —→ EDNW is collaborating with the Michigan Department of Education's Indigenous Education Initiative to develop three Tribal curriculum units to be implemented in schools serving students in grades 8–12 with a focus on boarding schools and the state's newly developed Essential Understandings. The Indigenous Education Initiative Team (IEIT) works with the 12 federally recognized Tribes that share geography with the state of Michigan and Indigenous communities to develop and maintain an authentic and meaningful consultative relationship. IEIT is a multidisciplinary team focused on building a cohesive, sustainable approach for collaboration between Tribes, the state, and local entities to identify and address educational issues and shared priorities. EDNW is co-constructing the curricular materials with IEIT staff members, other SMEs, and client and recipient partners. We use a culturally responsive and sustaining framework to ensure all products honor Michigan Tribes and imbue educators—and ultimately students—with a deeper understanding of the Tribes. The resulting curriculum will center the history, perspectives, contributions, and contemporary experiences of the Tribes, using accurate and approved materials and content.

Phase 3. Collaboratively Engage in Continuous Improvement and Feedback Cycles

Description and Research Base	Key Activities for Region 11 CC
<p>We tailor evidence-based practices to local needs, priorities, and context using data and feedback.</p> <p>We gather regular, frequent feedback to understand how clients and recipients experience our TA and use our tools and materials. We also collect evidence of effectiveness, with a focus on who benefits (or does not benefit) as well as unintended consequences.</p> <p>We engage in two-way feedback loops with partners about implementation (Metz et al. 2001) and gather data from multiple sources—including staff members, practitioners, recipients, and families—to monitor progress of each strategy along the way (Argyris, 1977; May et al., 2016; NIRN, 2015).</p> <p>We adapt our services in response to evolving contexts and new insights. We also guide client and recipient partners through iterative cycles of data- and evidence-driven change to ensure initiatives result in intended outcomes while simultaneously strengthening organizational structures and systems.</p> <p>We help SEAs develop a common language, set growth targets, monitor their performance, and correct course as needed. Through this process, teams develop evaluation tools and understand the elements of their approach that are having the intended impact.</p>	<ul style="list-style-type: none"> • Collect real-time, regular feedback from participants in our work through online or push surveys, regular client feedback interviews, observations, interviews, or artifacts • Monitor and measure success against indicators and evidence of effectiveness in context • Engage in two-way and multi-way feedback loops with client and recipient partners about tools, processes, and resources • Conduct annual reflection and planning sessions and make changes to projects based on data • Make necessary adaptations • Meet with REL leadership regularly to review potential process improvements • Participate in CC Network peer learning opportunities to share Region 11 successes and learn from others

In practice—→ Through our work operating Region 17 CC, EDNW created a series of evidence-based facilitator guides, titled *Improving Intermediate Academic Content and Literacy for English Learners*, for the Idaho State Department of Education (SDE).² The guides aim to help instructional leaders deliver consistent, research-backed professional development to teachers across the state. The year after we developed the guides, findings from our CC evaluation suggested that the content of the guides did not align to a shift in Idaho SDE's focus: Organizational changes had modified the SEA's approach to English learner support. Based on these findings, we led a complete revision of the guides in collaboration with SDE's English learner lead to align with the department's new vision and focus. We reinitiated contact with the SEA, followed up with the SEA staff member, and made the appropriate adjustments to our original project plan.

² <https://reg17cc.educationnorthwest.org/resources/academic-content-and-literacy-el-facilitator-guides>

Phase 4. Sustain and Scale

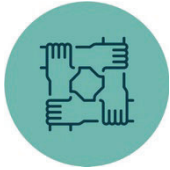
Description and Research Base	Key Activities for Region 11 CC
<p>Our approach facilitates the development of local programs and practices while increasing the capacity of implementation teams to sustain and scale services that reflect local contexts and values (Fixsen et al., 2015; Metz & Bartley, 2012).</p> <p>We monitor and improve supports and resources as needed to sustain implementation and use feedback loops with leadership, practitioners, staff members, recipients, and community members to communicate progress, strategies, and successes (NIRN, 2015).</p> <p>We focus on strengthening internal structures, tools, and processes so organizations and teams can better support LEAs, schools, and communities. Our emphasis on organizational skills rather than individual skills builds sustainable capacity, particularly for organizations facing staff turnover (Bush-Mecenas et al., 2023; Weinstock et al., 2019).</p> <p>We use partnerships, contextual knowledge, and documentation to support sustainable, visible systems improvement. Leveraging lessons learned from intentional and well-defined cycles of change, we build client and recipient capacity to implement and sustain a continuum of supports and interventions that improves educational outcomes for students, particularly those from underserved groups.</p>	<ul style="list-style-type: none"> • Regularly communicate successes and learning to partners, including clients and recipients • Ensure systems (data, human) can sustain scale-up by focusing on organizational skills • Support teams in change process including engagement and feedback • Identify and develop cost-effective strategies to make services available to as many clients and recipients in need of support as possible, including schools that have not asked for support but may need it based on available data • Co-develop tools and supports for replication and scale-up

In practice —→ Edmonds School District in Washington requested EDNW’s help to improve academic learning, graduation, and belonging for their students. Like many districts, Edmonds was challenged by turnover in district leadership, low staff morale, and ineffective instructional practices. In response, we collaborated with Edmonds to provide intensive TA to build systems and supports, codify them in practice, and share out to stakeholders with an eye toward systemizing and sustaining the work. Together, we established a multi-tiered system of support (MTSS) to foster instructional practices that are aligned, user-friendly, and data driven. Our team used a collaborative, multi-level process, including district- and building-level reviews, to inform revisions to district policy around the MTSS and develop a five-year strategic plan, including performance metrics, for the district.³ We also developed school improvement plan templates and an MTSS self-assessment tool, then supported their implementation at the district and building level. Finally, our team supported the district in presenting their new MTSS policy to the Washington Association of School Administrators.

³ <https://www.edmonds.wednet.edu/our-district/strategic-plan-2021-2026>

Six Foundational Principles

Our TA approach is driven by six foundational principles that manifest in every phase: **equity-driven, evidence-based, collaborative and responsive, priority-focused, aligned, and adaptable.**



Equity-driven. Recent research highlights the importance of addressing equity and biases in all phases of implementation work, including the approach, data review, stakeholder engagement, implementation, and follow-up (Kozleski & Smith, 2009; Loper et al., 2021; McKenzie & Scheurich, 2004; Metz et al., 2021). Without addressing equity and bias, implementation plans will be stalled or will not work.

EDNW has a track record of applying an equity-focused approach to implementation that yields transformative results. Our organizational vision is an excellent and equitable education for all, and our team is driven by a personal and professional commitment to systemic change and racial and economic justice. As facilitators, trainers, and researchers, we are aware that we must challenge our own biases. We understand that communities hold multiple viewpoints and that many power dynamics are often in play. We work closely with our client and recipient partners to address these dynamics and include the broadest possible representation while prioritizing the most underserved and underrepresented voices. We center the experiences of individuals, schools, and districts that are furthest from opportunity, using data to identify and engage those with the greatest need and improve their access.

“The equity audit helped the district to establish a draft equity policy, which was presented to the board and is being workshopped/revised ... The audit provided a baseline for monitoring progress moving forward, and improving progress monitoring was/is a priority need for the district ... The audit has informed the district strategic planning. The new strategic plan is being created with an equity lens.”

– District administrator reflecting on how the district used the results of an equity audit conducted with EDNW (2021)

To uphold our equity commitments, EDNW uses a range of tools, including culturally responsive and equitable consultancy and evaluation processes as well as an internal equity lens. Our equity lens is a series of five questions that staff members use to reflect on project management and implementation (table 3). This tool encourages our staff members to intentionally plan and reflect to create equitable and inclusive policy, practices, and procedures.

Table 3. Education Northwest Equity Lens

Section		Question
1	Vision and Mission	How does this decision, policy, program, or practice advance (or allocate resources to) our vision, mission, and values?
2	Inclusion	What considerations have been taken to include the voices, perspectives, and needs of those who will be most impacted by this decision, policy, program, or practice?
3	Who	Which groups are potentially disadvantaged and/or advantaged by this decision, policy, program, or practice?
4	Impacts	Does this decision, policy, program, or practice create, ignore, or worsen existing equity gaps or produce other positive, negative, or unintended consequences? If yes, how?
5	Strategies	How will you mitigate any negative impact, barriers, and/or root causes that have been identified and not yet addressed?

**Evidence-based.** Delivering an excellent and

equitable education requires a combination of

scientific rigor and lived experience—and our

work incorporates both. We leverage research literature and local

data to identify and implement interventions that are proven

effective and meet the needs of the communities we serve and

bring expertise on evidence-based interventions. For example,

Dr. Jennifer Esswein and Dr. Manuel Vazquez—co-director and

key project lead, respectively, for proposed R11CC work—are What Works Clearinghouse

“They [R17CC] have provided evidence-based resources that we can incorporate into our planning and delivery of our state-level plan. They have also provided us with examples from other states. I’ve been completely satisfied with the services from R17CC.”

—Montana OPI staff member (2022)

Certified Reviewers. Our approach is grounded in implementation science, which prioritizes relevance, feasibility, and local context (Bauer et al., 2015). We gather feedback from SEAs to understand how they use our services and to collect evidence of effectiveness, all while building their capacity to do the same. Ultimately, our goal is to foster evidence-based decision making across education systems to ensure all students have the opportunity to succeed.



Collaborative and responsive. Effective TA depends on collaboration and responsiveness—assessing local capacity and readiness, building local capacity, and leveraging local expertise (Fixsen et al., 2015). We respect the knowledge and experiences of SEA staff members—many of whom have worked in their field and in their states for years. We engage client and recipient partners at every stage to ensure our solutions are responsive to their needs, effective, and sustainable. We engage local educators, administrators, and community members with lived experience to assess the contextual fit of proposed interventions (Collaborative for Implementation Practice, 2023); coach them to build their confidence and competency; and engage clients and recipients in using data, tools, and protocols to build their capacity for evidence-based implementation (e.g., our capacity assessment and planning tools, described in the Performance Management and Evaluation Plan section). We remain responsive to local context and feedback through continuous improvement.



Priority-focused. SEAs and LEAs often have limited resources and competing needs. Focusing on strategic priorities can improve the impact, coherence, and sustainability of their work. To this end, we identify clear, high-leverage priority areas and design our TA and support around them. By sharpening our focus, we co-create realistic expectations that honor each client and recipient partner's priorities and hone our evaluation to gather feedback that is relevant and useful (Metz et al., 2001).



Aligned. The work of improving education systems cannot be done in isolation. EDNW understands the importance of aligning efforts across programs, including other federal centers, to combine resources while limiting disconnect and competition. Compared to overall SEA budgets, the resources to support CCs are negligible. Therefore, we recognize the importance of aligning Regional Center work to state priorities and building local (state and regional) and national partnerships to maximize impact. We collaborate with external partner organizations to create efficient, comprehensive, and coherent systems of support. By aligning our efforts with federal, state, and local priorities, we build the capacity of implementation teams to deliver effective interventions tailored to the culture, history, and values of the local community. Aligning with long-term priorities also supports sustainability and scaling of implementation (Fixsen et al., 2015; Metz & Bartley, 2012).



Adaptable. Adaptation is key for effective, equitable TA and implementation. SEAs may need to adapt policy and practice based on many variables, such as changes in elected leaders like chief state school officers or governors, shifts in public sentiment related to education, and novel findings from research. In addition, traditional implementation approaches may limit or even impede access for specific groups. EDNW remains flexible by adapting our services and delivery mechanisms to meet the moment. We focus on efficiency while inviting innovation and evolution to sustain long-term positive outcomes. We consider how many people will access and benefit from our services, which groups they belong to, and how each group may require different strategies and adaptations, especially cultural adaptations (Metz et al., 2021). We make sure our TA can adapt to evolving contexts, including emergencies in which information changes rapidly—an essential consideration in our post-COVID reality (Nastase et al., 2021a; 2021b).

Our Approach and Principles Yield Outcomes: Idaho Literacy Coaching Project

In 2021 our Region 17 CC team used the above approach and principles to co-develop a project with the Idaho State Department of Education focused on identifying, training, and supporting early literacy coaches in school districts. We supported the SEA to implement the training in spring 2022 and provided continued support to coaches afterward. At the end of the 2022–23 school year, over 80 percent of participant coaches reported the development of a literacy development action plan and increased knowledge and implementation of evidence-based literacy instructional practices. **By spring 2023, Idaho early literacy scores had improved from 2022—even outperforming national averages.** The project continued through the 2023–24 school year. Today, the SEA engages in continuous improvement with plans to sustain the project through a federal Comprehensive Development Literacy Grant.

Logic Model

Now that we have described our TA and capacity-building approach in detail, we situate it within the larger R11CC logic model to illustrate how our approach—when bolstered by inputs from R11CC partners—influences change and produces outcomes (figure 2). Below we describe each element of the logic model and how it operates in relation to the others, followed by a visual of the logic model. Later in the project descriptions, we articulate project outcomes that our evaluation plan is designed to measure.

Inputs represent the resources and contributions that R11CC operating partners and client and recipient partners bring to the work. The SEAs, LEAs, and schools we work with bring knowledge and capacity to influence, inform, and shape our work. Together, we bring a laser focus on learners and an equity-first mindset; contextual understanding of and lived experience in the five Northwest states as well as sovereign Tribal nations; a vast network of relationships and local and national partnerships; deep subject matter expertise; and a strengths-based approach that starts with and builds on assets.

The **activities and outputs** component is the previously described approach.

Short-term outcomes reflect **human, resource, policy, and organizational capacity** outcomes we expect to see within the first year of implementing TA. These outcomes exhibit

change, growth, and improvements related to engagement; knowledge; communication; and creating systems, structures, and processes. Short-term outcomes are often formative and help us adapt our implementation to improve the likelihood of reaching the long-term outcomes.

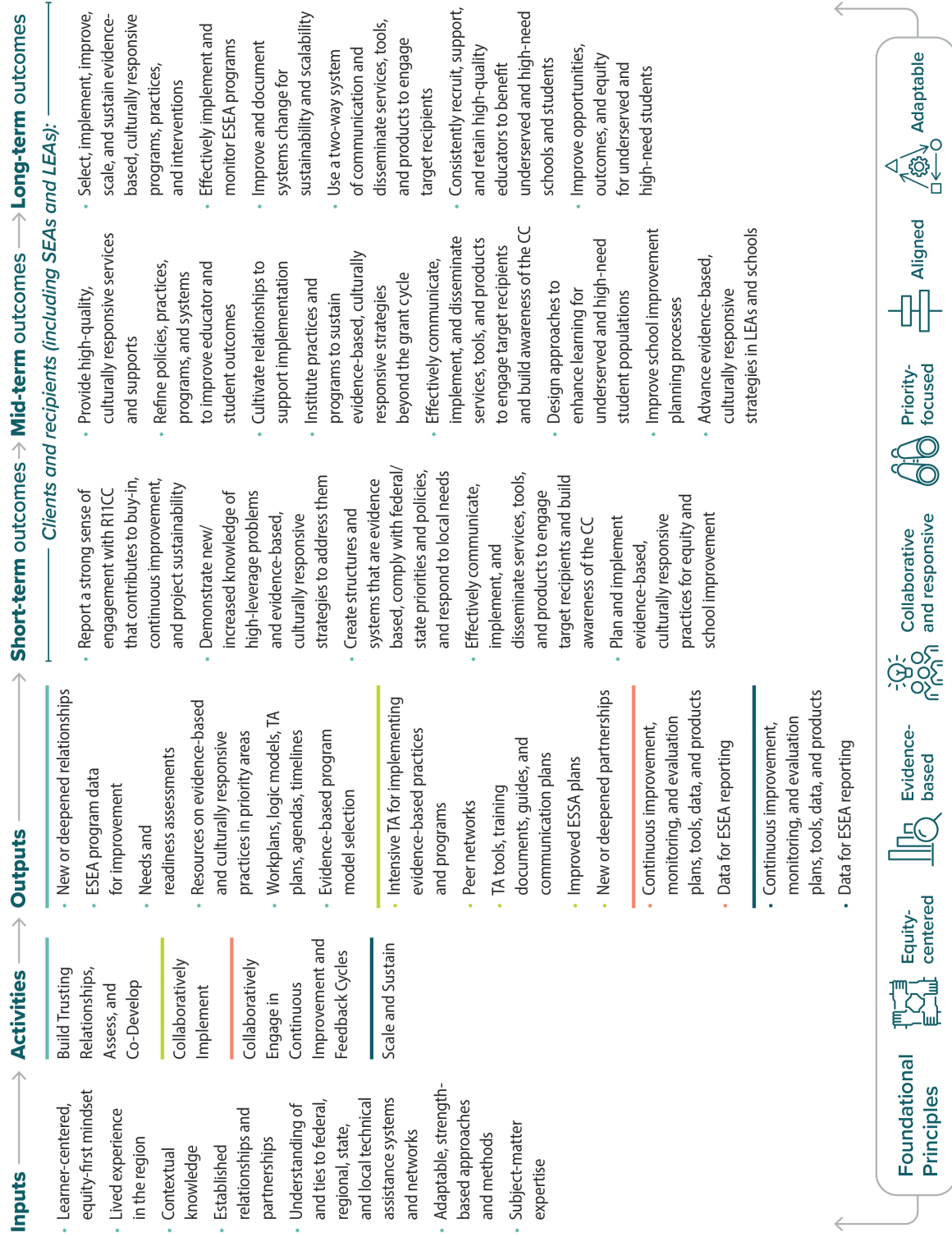
Medium-term outcomes, typically seen in years 2–3, represent further growth and improvement in the four capacities. They reflect more established structures, systems, policies, and practices; the existence of evidence-based practices and programs; and high-quality and targeted services, tools, and products as well as initial improvements in teaching and learning.

Long-term outcomes identify areas where we aim to see change in educational services, teachers and instruction, and student outcomes. These outcomes are likely to be evident in the final two years of R11CC work. Long-term outcomes are the hardest to achieve, measure, and attribute to one project. For each R11CC project we aim for longer-term outcomes for educational systems change and teaching and learning, such as recruiting, supporting, and retaining high-quality educators and effectively implementing and monitoring ESEA programs.

The **foundational principles** described above drive our entire R11CC approach.

This logic model is also the basis for the R11CC performance management and evaluation plan. The plan describes how the short-, medium-, and long-term outcomes from the logic model align with the federal performance measures required for the Center evaluation and how our formative and summative data collection strategies will be in pursuit of all performance measures and outcomes. Furthermore, the evaluation plan section discusses how the evaluation team will work with R11CC project teams to develop project-specific logic models aligned to the R11CC logic model and ensure we can measure each project for improvement, impact, and long-term outcomes.

Figure 2. Region 11 Comprehensive Center Logic Model



A2. CAPACITY-BUILDING STRATEGIES THAT ADDRESS STATE AND LOCAL EDUCATION SYSTEM NEEDS

This section will demonstrate, through the proposed R11CC service plans, how we will pursue the logic model by supporting states, local educational systems, and other TA recipients in four required areas key to improving teaching and learning, especially for high-need students:

-
- **Implementing ESEA Consolidated State Plans**, particularly Title I, Part A (Office of Elementary and Secondary Education, 2024)
 - **Implementing, scaling, and sustaining evidence-based programs and practices** in the following content areas: addressing educator shortages, extending pathways to multilingualism, improving resource allocation (U.S. Department of Education, 2022), accelerating academic achievement in math and literacy, designing and implementing high-quality assessments, and aligning and integrating agency systems
 - **Addressing educational obstacles** faced by underserved populations of students
 - **Improving implementation of ESEA programs**, particularly in response to audit findings or monitoring
-

Our proposed team knows intimately the Region 11 states' processes for identifying schools in need of support (i.e., comprehensive support and improvement [CSI], targeted support and improvement [TSI], additional targeted support and improvement [ATSI]) and the specific support provided. For example, EDNW has supported Alaska and Idaho to develop and revise their methodologies for identifying the 5 percent of lowest-performing schools receiving Title I, Part A funds for CSI. Further, given the rurality of the region, the states' minimum N size is such that some schools have grade levels or entire schools that fall below the threshold. Our staff has worked with Alaska and Idaho to develop separate processes to identify small schools that cannot be identified through general identification methods due to N-size limitations but may be performing below expectations and require support. Finally, our staff has provided direct school improvement support to individual CSI schools in each Region 11 state. **This knowledge, understanding, and experience informed our proposed state service plans and targeted TA recipients, and it will continually inform the scope of work over the five-year period.**

Assessing Needs to Develop Service Plans

EDNW implemented our collaborative approach to needs sensing and co-development to create the scope of work outlined in this proposal. We first met with each state chief and/or their designees to review each state's needs and priorities in alignment with the Regional Advisory Committee priorities. We then conferred with SEA staff members on multiple occasions; leveraged our existing knowledge, relationships, and projects; and reviewed state data, strategic plans and priorities, and Every Student Succeeds Act (ESSA) plans to build service plans that address state and local needs and align to the required areas outlined above.

Service Plan Overview

Our service plan responds to state and local needs with a focus on the highest-need communities, particularly CSI and TSI schools, Title I schools, rural areas, and underserved student populations. Our projects leverage the role of the CC system and will be implemented with our proven approach. Projects reflect our in-depth understanding of the goals and priorities of Region 11 states and local educational systems while aligning with federal focus areas. We balance responsiveness with coherent, coordinated, and efficient service delivery.

Our service plan provides one detailed project for the region and two for each state as well as additional project concepts for out years. Each project has detailed milestones, outputs, and outcomes for years 1–2 and high-level milestones, outputs, and outcomes for years 3–5.⁴ We will refine these with state leadership teams within the required 90-day period after award and submit them to ED for review in annual service plans. We view the 90-day period as an essential time to cultivate our relationship with the ED and learn about its vision and priorities for the CC system and R11CC specifically. Because we understand the changing nature of state and regional

⁴ A five-year timeline can be found in appendix A.

priorities and legislative contexts, we will work with clients and recipients in Region 11 to adapt our plans in response to changes over the five-year period, such as changes in federal or state priorities and needs identified through data and needs sensing (See the Stakeholder Engagement section). Table 4 outlines proposed R11CC projects aligned with priority areas and requirements.

Table 4. Proposed Region 11 CC Projects Aligned with Priority Areas and Requirements

	Implementing Consolidated State Plans	Implementing, Scaling Up, and Sustaining Evidence-Based Programs and Practices						Addressing Educational Obstacles	Improving Implementation of ESEA Programs
		Math	Literacy	Accelerate Academic Achievement	Core Instruction	Assessment	Educator Shortages	Aligned and Integrated Systems	
Native Education Network: AK, ID, MT, OR, WA	●	To be determined—contingent on focus of state’s action plan with the Network.						●	●
Developing Skilled Lifelong Readers: AK	●		●	●	●			●	●
Addressing Educator Shortages: AK	●						●	●	●
Teacher Mentoring: ID	●				●		●	●	●
Continuous Improvement for State-Delivered Federal Programs Services: ID	●							●	●
Learning Standards: MT	●	●	●	●	●	●		●	●
Comprehensive School Reform—More Rigorous Intervention: MT	●							●	●
Language Revitalization Through Early Literacy Tribal Consultation: OR	●		●	●				●	●
Multilingual Learner Reporting Guidance: OR	●			●				●	●
Learning Standards: WA	●	●	●	●	●	●		●	●
Early Learning and Expansion of Transition to Kindergarten: WA		●	●	●				●	

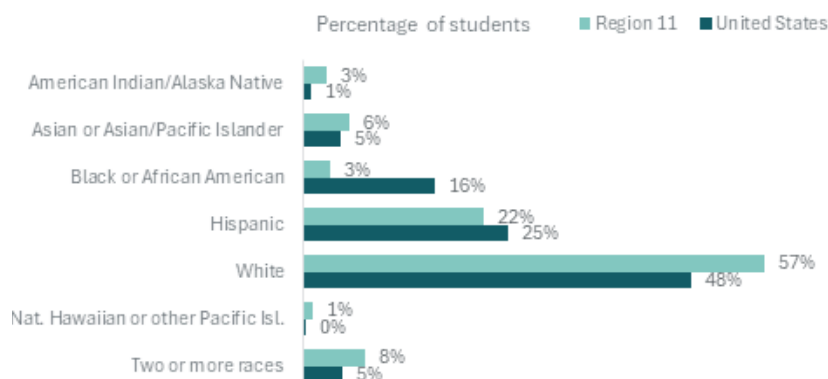
Regional Context Informs Our Plans

The region is geographically expansive. The five states in Region 11 make up 28 percent of the total area of the U.S. (U.S. Census Bureau, n.d.) and include 1,282 school districts with nearly 6,000 schools that served over 2.2 million students in 2022–23 (approximately 4.5%

of all publicly enrolled students across the country; National Center for Education Statistics [NCES], 2023b). These numbers vary across the states, from Alaska—with 54 districts, 498 schools, and 130,723 students—to Washington—with 340 districts, 2,549 schools, and over one million students. We incorporate technology and remote services throughout our service plans to address this expansiveness, as our client and recipient partners are adept at this approach.

The demographic profile of students in Region 11 is unique, varying from national averages and from state to state. Across the states, nearly twice as many students identify as American Indian/Alaska Native (AI/AN) compared to the national average, and a higher percentage identify as Asian or Asian/Pacific Islander, Native Hawaiian or other Pacific Islander, white, and two or more races (figure 3). Each state, however, represents a unique cultural and demographic context. For example, in Alaska and Montana over 10 percent of students identify as AI/AN (21.6% and 10.4% respectively), whereas Idaho, Oregon, and Washington each have close to 1 percent of students who identify as AI/AN (NCES, 2024a). Given this demographic profile, we propose a five-state regional project addressing AI/AN students as well as individual state-specific plans crafted to meet unique student needs.

Figure 3. Student Race/Ethnicity in Region 11 and Nationally (2022–23)



Source: National Center for Education Statistics, Common Core of Data, "State Nonfiscal Public Elementary/Secondary Education Survey", 2022-23 v.1a.

Student performance varies across the region. On average, students across Region 11 performed similarly to students nationwide on the National Assessment of Educational Progress (NAEP) in 2022. However, students in some Region 11 states consistently outperform students nationwide. In Montana and Washington, students in grades 4 and 8 outperform the national average in math and reading, and students in Idaho surpass the national average in math for grades 4 and 8 and in reading for grade 8. On the other hand, in Alaska and Oregon, students consistently perform below the national average in all grades and subject areas. The difference is particularly prominent for grade 4 reading scores in Alaska (table 5). As a result, Region 11 service plan projects primarily support efforts to accelerate academic improvements and address post-pandemic learning loss for specific populations and/or content areas. For example, the regional service plan focuses on a cross-state project to support improvements in teaching and learning for Native students. More about how these academic outcomes influence the Region 11 scope of work can be found in each state’s specific service plan.

Table 5. NAEP Math and Reading Scores in Grades 4 and 8, Nationwide and Region 11 (2022)

	Grade 4 Math	Grade 4 Reading	Grade 8 Math	Grade 8 Reading
U.S.	235	216	273	259
Alaska	226 (-9)	204 (-12)	270 (-3)	253 (-6)
Idaho	236 (+1)	215 (-1)	282 (+9)	264 (+5)
Montana	239 (+4)	219 (+3)	277 (+4)	261 (+2)
Oregon	228 (-7)	210 (-6)	270 (-3)	257 (-2)
Washington	235 (=)	217 (+1)	276 (+3)	262 (+3)

Sources: National Center for Education Statistics, National Assessment of Educational Progress (NAEP), 2022 Reading Assessment; NAEP, 2022 Mathematics Assessment.

Cross-State Region 11 Service Plan

The five Region 11 states have many unique features that will be addressed through the individual state intensive capacity-building projects outlined in the next section. However, some educational needs and contexts are similar across the region, which inspired us to develop a

regional approach to capacity building that allows for cross-state collaboration and consultation; sharing of evidence-based strategies and lessons learned to accelerate improvement; and scaling services to as many clients and recipients as possible. Below we propose one cross-state project based on regional demographics and common needs related to supporting Native students.

Regional Project 1. Region 11 Native Education Network

A Native education network that brings state teams together to address cross-state Tribal issues and improve, align, and implement evidence-based policies, practices, and systems of support for AI/AN students.

Background, High-Leverage Problem, and Identified Need

Nearly half of the 574 federally recognized AI/AN Tribes are located in and across the five states of Region 11 (American Institutes for Research, 2023). Some Tribes cross state boundaries, and many have student-aged children who are educated in public schools, Bureau of Indian Education (BIE) schools, or Tribally controlled schools (American Institutes for Research, 2023). Many Tribal nations offer education services. Tribal education departments often administer federal and state education grants; oversee partnerships with public K–12 schools; and offer cultural, linguistic, and other educational programming to their communities. Some Tribes operate their own preschools or Head Start programs, K–12 schools, or Tribal colleges.

Due to historical and systemic inequities, Native students in Region 11 experience disparate outcomes. For example, in four of the five states, graduation rates for Native students in 2020–21 were between 11 percent and 17 percent lower than the state averages (in Washington, graduation rates were equal for Native and non-Native students; NCES, 2024d). Similarly, in Alaska and Montana, Native students' average grade 4 reading scores trailed the state averages by more than 35 points in 2022 (the other states did not have data available for 2022; NCES, 2023a).

To address these and other inequities and improve Native student outcomes, Tribes and state agencies across Region 11 have been working on various Native education initiatives. Supporting Native students is built into each state's educational priorities in various ways. For example,

- The **Idaho State Department of Education (SDE)** Indian Education Goals include enhancing communication with local and Tribal education agencies, removing educational barriers for the AI/AN population, and expanding best practices in teacher preparation and professional development. A current Region 17 CC project supports three Idaho Tribes in implementing their State-Tribal Education Partnership grant, forming a consortium comprising the three Tribes and four local schools. The project goal is to enhance consultation and collaboration using a process developed by the National CC's Native Education Collaborative.⁵
- The **Oregon Department of Education (ODE)** focuses extensively on Tribal sovereignty and AI/AN education, such as the development and implementation of its Tribal consultation toolkit (ODE, 2023) and AI/AN Student Success Plan (Office of Indian Education, 2020). Much of ODE's focus on Native education emerges from the report *American Indian/Alaska Native Students in Oregon: A Review of Key Indicators* (ODE, 2020).

⁵ <https://compcenternetwork.org/ccnetwork-highlights/topic/7432/native-education-collaborative>

While all Region 11 states focus on Native education, there is an essential need and opportunity to connect, collaborate, and learn from one another. Region 11 states need system supports to continue to improve teaching and learning for Native students in evidence-based, culturally sustaining ways.

From our collaboration with Tribes in the region, we know there is a desire to break down Westernized borders between the Northwest states (Lightfoot & Stamatopoulou, 2023). Our proposed R11CC team has unique capabilities to support continuous improvement around Native education across Region 11 given our deep understanding of the regional and state contexts, particularly regarding AI/AN students; our existing relationships, partnerships, and projects in the region that focus on Native education (see project descriptions in appendix I); and our subject matter expertise related to Native education (see section C1 for key project personnel).

Scope of Services and Intended Recipients

R11CC proposes to design and launch a regional, cross-state Native Education Network for teams from each state to: 1) identify a high-leverage need or problem of practice related to improving teaching and learning for Native students that is specific to the state context; 2) develop a plan to address the need or problem of practice (some states may develop plans that leverage existing work plans or initiatives while other states may need to gather stakeholder input using *Circles of Reflection: A Toolkit for SEAs* [Smoker Broadbudd & Bitterman, 2023]); and 3) convene quarterly (with support from R11CC, local and national partners, and other SMEs) to learn about and share research and evidence-based practices, collaborate on key topics, problem solve, discuss where connections can be made across states to support Native students, and engage in state-to-state consultation and peer learning. In between convenings, individual state teams will work with and receive support from R11CC SMEs to make progress on state-specific plans, such as analyzing state-specific data, identifying evidence-based practices in focus areas, considering plans for stakeholder engagement, or discussing coherence and alignment across state efforts. State plans may focus on:

- State-Tribal education compacting
- Creating school environments with supports that enhance the well-being of Native students
- Native culture and language
- Tribal consultation and government-to-government communication focused on educational opportunities and equitable outcomes for AI/AN students

If the National CC continues to operate the Native Education Collaborative, we will collaborate with the National CC to balance universal and targeted TA offered through the Collaborative with the intensive TA provided through this Region 11-focused Native Education Network.

Intended recipients include SEA staff members, educational service districts (ESDs), LEAs, state-specific Native education system partners, teachers and leaders, and Native students.

Alignment to Regional Center Requirements

- **Implementing ESEA Consolidated State Plans, particularly Title I, Part A:** Supporting Native education will support implementation of the states' ESEA/ESSA plans; for example, CSI schools enroll higher percentages of AI/AN students than other school types (Government Accountability Office, 2024).
- **Implementing, scaling up, and sustaining evidence-based programs and practices:** R11CC will collaborate with the states and the overall network to identify evidence-based practices and programs that will advance their action plans.
- Addressing the **unique educational obstacles** faced by underserved populations, specifically Native students.

- **Improving implementation of ESEA programs:** This project will support state and district efforts to implement several ESEA programs—particularly Title I, Part A; Title IV, Part A; and Title VI, Part A—as well as any ESEA programs that reach Native students and are identified in the states’ corrective action plans or ESEA monitoring reports

Responsible Personnel

Christine Pitts, Mandy Smoker Broadbus, and RunningHorse Livingston (EDNW)

Key Partners

ESDs, LEAs, Tribal nations and Tribal education departments, the BIE Regional CC, BIE and Tribally controlled schools, the Washington State Native American Education Advisory Committee, the Native Indian Language Institute at University of Oregon, Western Educational Equity Assistance Center, REL Northwest, National CC, National Indian Education Association, state Indian education directors, Indigenous Education State Leaders Network, Affiliated Tribes of Northwest Indians, and other state-level Native education committees and groups

Milestones	Outputs
<p><i>(Year 1, Quarters 1 and 2)</i></p> <ul style="list-style-type: none"> • R11CC staff members conduct interviews with state contacts to get input about focus and format of the Network • State teams form • Sign MOU committing to Network participation and progress on the action plan • Network kick-off meeting where teams identify needs, problem of practice, and focus area and begin to develop state action plans; plans must include communication and stakeholder engagement • State teams engage individually with R11CC for intensive TA supports 	<ul style="list-style-type: none"> • Summary of state interviews • MOUs • Materials for kick-off meeting • State plans using co-developed template • Documented processes, learnings, and next steps from sessions
<p><i>(Year 1, Quarters 3 and 4)</i></p> <ul style="list-style-type: none"> • Two Network meetings • State teams engage individually with R11CC for intensive TA supports • If available, engage in National CC universal TA • Progress on state action plans 	<ul style="list-style-type: none"> • Materials for Network meetings • Materials for state-specific intensive TA depending on focus area • Advanced iteration of state plans • Documented processes, learnings, and next steps from meetings and convenings
<p><i>(Year 2, Quarters 1 and 2)</i></p> <ul style="list-style-type: none"> • Two Network meetings • State teams engage individually with R11CC for intensive TA supports • If available, engage in National CC universal TA • Progress on state plans 	<ul style="list-style-type: none"> • Materials for Network meetings • Materials for state-specific intensive TA depending on focus area • Advanced iteration of state plans • Documented processes, learnings, and next steps from meetings and convenings • State-specific artifacts as evidence of progress on plans (e.g., guidance;

	workbooks; improved policies, programs, or procedures; communication with stakeholders)
<p><i>(Year 2, Quarters 3 and 4)</i></p> <ul style="list-style-type: none"> • Two Network meetings • State teams engage individually with R11CC for intensive TA supports • If available, engage in National CC universal TA • Progress on state plans 	<ul style="list-style-type: none"> • Materials for Network meetings • Materials for state-specific intensive TA depending on focus area • Advanced iteration of state plans • Documented processes, learnings, and next steps from meetings and convenings • State-specific artifacts as evidence of progress on plans (e.g., guidance; workbooks; improved policies, programs, or procedures; communication with stakeholders)
<p><i>(Years 3–5)</i></p> <ul style="list-style-type: none"> • Revisited plan for Network and state-specific convening approach • Continued progress on state action plans • Continuous improvement, scale, and sustainability of strategies outlined in action plans 	<ul style="list-style-type: none"> • Documents and data reflecting improved policies, programs, procedures, systems, and outcomes related to educational services and teaching and learning identified in states' action plans

Outcomes

Short-Term

- State teams form and are engaged
- Connections with local, state, and regional partners are developed or re-solidified
- Focus areas for the action plans are defined
- Begin to identify evidence-based practices

Medium-Term

- At least 50 percent of action plan goals and outcomes are met

Long-Term

- 100 percent of states' action plan goals and outcomes are met
- SEAs and Tribal entities build sustainable and cohesive partnerships for system improvement in support of AI/AN students and families, including improved outcomes for students

Dissemination

The Region 11 Native Education Network will disseminate a summary of state action plans, including strategies and practices to address needs and problems of practice; case studies illustrating cross-state efforts, synergies, and outcomes; and state-specific tools and resources that emerged as a result of the work. Materials will also be made available to the CC Network.

In addition, we will consider (upon award and in consultation with stakeholders and partners) **a project for our service plan at the regional level that supports education systems in rural and rural remote areas across the five states.** Across Region 11, a substantial portion of students attend rural schools (Alaska: 30%, Idaho: 31%, Montana: 38%, Oregon: 17%, Washington: 13%; NCES, 2022). Our proposed R11CC partnership brings extensive subject matter expertise and experience supporting rural education that could respond to targeted needs specific to the five-state region. For example, the Region 17 CC, operated by EDNW and serving Idaho and Montana, co-leads the NW RISE Network with Region 16 CC. This network brings together teachers and leaders from the region's most isolated and remote communities to share common problems of practice and improve outcomes for students.⁶

Individual State Capacity-Building Strategies and Service Plans

In addition to a regional approach, we designed five-year service plans and projects specific to the context and priorities of the five individual Region 11 states. Each state faces unique challenges and has established distinct, responsive priorities to support students, educators, schools, and districts. As a longtime provider of capacity-building services in the Northwest, EDNW is keenly aware of the areas in which the SEAs have a need to build capacity. Our team pays close attention to current and pending legislation to understand and anticipate actual and emerging needs. We also recognize the evolving nature of needs and priorities. To build on what we have learned through our on-the-ground work and legislative knowledge, EDNW met with 15 SEA staff members and leaders across the five states to identify and confirm the high-leverage challenges and accompanying capacity-building needs that, if addressed, could result in substantial improvements for students throughout the region. *Letters of support from*

⁶ <https://reg17cc.educationnorthwest.org/nw-rise>

chief state school officers and other local, state, and regional partners are provided in “Letters of Support Attachment.”

Alaska Department of Education & Early Development (DEED) Service Plan

Though Alaska is geographically the largest state in the country, it ranks 48th in population based on the 2020 census. With its large size and small population, Alaska is the most rural state in the nation: It ranks 50th in population density with 0.8 residents per square



Alaska

Commissioner of Education: Deena M. Bishop
Appointed August 2023

Governor: Mike Dunleavy
First elected 2018; Current term ends December 7, 2026

mile (Alaska Department of Labor & Workforce Development, 2020). There are 228 federally recognized Tribes across Alaska—more than any other state in the country—and more than 20 Indigenous languages (Alaska Native Language Center, n.d.; Bureau of Indian Affairs, n.d.).

Alaska by the Numbers

- In the 2022–23 school year, **Alaska had 54 school districts with 498 public schools that served 130,723 students** (NCES, 2023b).
 - About 30 percent of students in Alaska attend schools in **rural or rural remote areas** (NCES, 2022).
 - Students in Alaska are **primarily white, AI/AN, or two or more races** (NCES, 2024a).
 - Alaska has a **similar percentage of English learner students** to the national average (10.8% compared to 10.6% nationwide; NCES, 2024c).
 - Alaska has **fewer students eligible for free or reduced-price lunch** compared to the national average (39.5% compared to 53.3% nationwide; NCES, 2024b).
 - Student **performance in Alaska is generally below the national average**. For example, 2022 NAEP reading scores for students in grades 4 and 8 were 12 and six points below the national average, respectively, and NAEP math scores for students in grades 4 and 8 were nine and three points below the national average, respectively (see table 5).
 - **Graduation rates are lower** than the national average (78% compared to 87% nationwide; NCES, 2024d).
 - **Teacher shortages are reaching critical levels**. With teachers leaving and fewer teachers joining the workforce, the teaching population is down 16 percent from 2002 (Warren, 2023).
-

Alaska is focused on several priorities to address longstanding education challenges and new issues that have emerged since the pandemic. At the forefront is Alaska DEED's strategic plan (2020), "Meeting Alaska's Education Challenge Together," which aims to ensure that every student receives a high-quality education that is equitable and culturally relevant. The plan prioritizes literacy, equity, teacher support, and community engagement. It outlines several strategic priorities, such as increasing student success and cultivating safety and well-being.

A primary goal of the plan is enhancing literacy across the state. The Alaska Reads Act, a cornerstone of this effort, emphasizes early literacy (Alaska DEED, 2023). The goal is to ensure that all students read proficiently by the end of grade 3, setting a solid foundation for future academic success. Efforts to improve teacher retention and recruitment are also underway, addressing the heightened challenges faced by educators during the pandemic.

Closing the achievement gap is another priority, as the state works to ensure that all students, regardless of socioeconomic status or geographic location, receive equitable educational rigor and resources. For this reason, Alaska emphasizes culturally relevant education and increased community involvement by incorporating Alaska Native cultures and languages into curricula and fostering local partnerships to ensure that education is relevant and responsive to the needs of all students.

Alaska Project 1. Developing Skilled Lifelong Readers: Strong Foundations and Beyond

The Alaska Literacy Learning Hub will engage local literacy providers to strengthen capacity and expand their reach to develop, implement, and scale evidence-based early literacy practices.

Background, High-Leverage Problem, and Identified Need

The most recent NAEP results show a noticeable gap between Alaska students' reading achievement and the national average (see table 5). Alaska acknowledges that early literacy begins at birth and that earlier interventions have greater likelihood of long-term success. For that reason, strategy 3 of Alaska's Strategic Reading Plan focuses on increasing and supporting early learning and providing high-quality opportunities for children birth to 5 to increase kindergarten readiness statewide (Alaska DEED, n.d.-b).

These efforts include establishing an early education grant program⁷ through the Alaska Reads Act;⁸ developing the Alaska Developmental Profile⁹ to identify, record, and summarize the skills and behaviors students demonstrate upon entry to school; codifying the Parents as Teachers program;¹⁰ adopting early education program standards and evidence-based early education literacy curricula; and supporting partnerships (e.g., Department of Health, Head Start, Early Childhood Taskforce).

DEED supports early literacy efforts led by community-based early childhood partnerships; hosts early literacy institutes for parents, caregivers, and teachers featuring multilingual and multicultural approaches proven effective for growing early literacy skills; and provides training for using the Early Learning Guidelines, the Alaska Birth to Graduation State Literacy Blueprint, and activities to support early literacy.

Despite the presence of numerous organizations with extensive expertise and resources dedicated to improving literacy achievement, efforts remain uncoordinated, and resources are not always effectively utilized or widely disseminated.

Scope of Services and Intended Recipients

EDNW will support and strengthen scale-up of ongoing local partnerships and evidence-based practices by creating the *Alaska Literacy Learning Hub (AKLLH)*. We will focus on growing the impact of existing partners by expanding their reach and building human and organizational capacity to improve practice and strengthen systems for improved coordination.

We will work with DEED, our partners, and Alaska early learning program leaders to develop capacity to identify and implement evidence-based practices in early literacy; use assessments and grow skills in data analysis; and support families, child care providers, and early childhood educators. First, we will create a representative steering committee to align needs with existing services and work with partners to fill gaps of needed support. The main focus of the AKLLH will be to create an online “hub” learning and dissemination space, to provide training for administrators and educators on early literacy best practices, and to offer ongoing support and resources for implementing new strategies in a culturally responsive way (Alaska Native Knowledge Network, 1998; EDNW, n.d.). Through this work, we will scale evidence-based instructional and leadership practices to improve early literacy for students as envisioned in Alaska’s strategic plan and the Alaska Reads Act.

Intended recipients include DEED staff members, early learning program leaders, and early childhood educators across the state.

Alignment to Regional Center Requirements

- **Implementing Alaska’s ESEA Consolidated State Plan, particularly Title I, Part A:** This project will contribute to improving academic outcomes for high-needs students in the area of literacy (Alaska DEED, 2017)
- Implementing, scaling up, and sustaining **evidence-based programs** and practices in literacy
- **Addressing the unique educational obstacles faced by underserved populations:** This project focuses on students in early childhood, particularly those living in rural and remote areas
- **Improving implementation of ESEA programs:** This project will focus on supporting literacy outcomes in the highest-need schools and districts in Alaska

⁷ <https://education.alaska.gov/akreads/early-education-programs2>

⁸ <https://education.alaska.gov/akreads>

⁹ <https://education.alaska.gov/assessments/developmental>

¹⁰ https://education.alaska.gov/akreads/AK_Reads_Early_Ed_and_PAT_One-pager.pdf

Responsible Personnel

Lymaris Santana (EDNW) and Silvana Hackett (Child Trends)

Key Partners

DEED, Alaska Early Childhood Coordinating Council, Head Start, Alaska Staff Development Network, Association of Alaska School Boards

Milestones	Outputs
<p><i>(Year 1, Quarter 1)</i></p> <ul style="list-style-type: none"> • Assemble representatives from each partner group • Develop agreed-upon purpose and meeting frequency • Gain a shared understanding of the current state of early literacy 	<ul style="list-style-type: none"> • Collaboratively developed Alaska Literacy Learning Hub logic model
<p><i>(Year 1, Quarters 2 and 3)</i></p> <ul style="list-style-type: none"> • Identify successes, gaps, and challenges in existing services, programs, and systems • Identify most appropriate, efficient, and relevant mechanism(s) for “hub” component of the project, such as a website, repository on DEED’s website, and/or online community • Steering committee creates an action plan 	<ul style="list-style-type: none"> • Updated needs assessment tool¹¹ • Needs assessment report • Action plan
<p><i>(Year 1, Quarter 4 and Ongoing Throughout the Project)</i></p> <ul style="list-style-type: none"> • Support the identification, development, organization, and dissemination, particularly through hub, of evidence-based instructional strategies (i.e., content and process) that provide developmentally, culturally, and age-appropriate curricula to be used in a variety of settings. • Develop and implement trainings that respond to needs and challenges in existing services, focus on collaboratively identifying and implementing evidence-based practices, and create coherence and alignment across the early learning literacy space in Alaska. For example, trainings may focus on supporting the development of literacy programs and plans related to oral language and pre-literacy skills, infusing culturally relevant materials and practices, integrating efforts to preserve the Tribal languages of AI/AN children, or strategies for engaging parents and families. 	<ul style="list-style-type: none"> • Summary of evidence-based instructional strategies aligned with needs in action plan • Program design templates, tools, and workbooks • Training materials
<p><i>(Year 2, Quarters 1 and 2)</i></p> <ul style="list-style-type: none"> • After one year of hub efforts and in collaboration with DEED, develop an early literacy program monitoring tool that establishes metrics for program design, implementation, and impact that includes formal and informal measures to monitor progress, input from families and professionals, and respects cultural diversity 	<ul style="list-style-type: none"> • Monitoring tools • Initial findings from monitoring and evaluation
<p><i>(Year 2, Quarters 3 and 4)</i></p>	<ul style="list-style-type: none"> • Sustainability plan

¹¹ <https://earlychildhoodalaska.com/wp-content/uploads/Final-AK-PDG-Needs-Assessment-Report-Rev.pdf>

<ul style="list-style-type: none"> • Develop a plan for scaling and sustaining successful strategies 	
<p><i>(Years 3–5)</i></p> <p>Ongoing implementation and continuous improvement</p> <ul style="list-style-type: none"> • Scale implementation of the professional development and trainings 	<ul style="list-style-type: none"> • Lessons learned and findings from scaled trainings • Findings from ongoing monitoring and evaluation

Outcomes

Short-Term

- High-quality engagement from coordinated partners and initial selection of early literacy program staff members
- Reports of increased understanding about evidence-based strategies for early literacy

Medium-Term

- Reports that professional development and trainings were high quality, useful, and relevant

Long-Term

- Codified systems for developing and implementing evidence-based early literacy programs
- Improved use of literacy instructional strategies among early learning educators
- Improved literacy outcomes for children

Dissemination

The Region 11 Alaska Literacy Learning Hub will disseminate evidence-based practices that emerge from hub and training efforts through blogs, briefs, and virtual convenings to other early learning administrators and educators across the state and region. Materials will also be made available to the CC Network.

Alaska Project 2. Addressing Educator Shortages

R11CC will offer intensive TA to support the implementation of the Teacher Recruitment and Retention Action Plan, critical for addressing Alaska teacher shortages.

Background, High-Leverage Problem, and Identified Need

Across the nation, states are experiencing a teacher shortage that was exacerbated by the pandemic. Alaska is no different: Annual teacher turnover rates in Alaska range from 22 percent to 24 percent but are typically higher in rural and remote areas (from 25% to 31% in 2020–21; REL Northwest, 2021). Since 2013, the number of certified teachers in the state has steadily decreased; by 2022, the teacher count was down 16 percent from 2002 (Warren, 2023). This decrease is partly due to teacher churn but also due to fewer teachers entering the workforce (Warren, 2023). Furthermore, data presented in the state’s 2024 legislative session show that the number of teachers on emergency certificates and the number of first-day teacher vacancies have both climbed sharply since 2020 (Parady et al., 2024).

Alaska has been working in earnest since 2020 to address teacher recruitment and retention. The Governor’s Teacher Recruitment and Retention (TRR) Working Group, established in May 2020, was charged with reviewing the root causes of this challenge in Alaska and proposing solutions to attract and

retain great teachers. In 2021, the working group produced a final report with survey findings (Adams, 2021b). Following that, the TRR Action Plan presented recommendations for addressing the root causes that emerged, including a focus on six essential areas (Adams, 2021a).

The state is now in the implementation phase of the action plan but lacks the resources to implement without the support of the CC. The SEA team has explicitly requested support (Adams, 2022).

Scope of Services and Intended Recipients

R11CC, in partnership with SME Dr. Barbara Adams, is in a unique position to collaborate with DEED to support continued implementation of the TRR Action Plan. Dr. Adams authored the action plan and is collaborating with DEED to implement it. Dr. Adams is an exclusive SME for the proposed R11CC.

R11CC's work to support implementation of the TRR Action Plan will focus on:

- Continued communications about the action plan to the field
- Supporting district efforts to develop and implement local-level teacher recruitment and retention action plans, including:
- Develop and disseminate a local action planning tool
- Provide virtual support to district teams on the design, development, and implementation of local plans (e.g., data analysis and needs assessment; coherence planning; identification, development, and implementation of practices such as Tribal educator preparation pathways and/or registered teacher apprenticeship programs to grow a community-based teacher workforce; identification, development, and implementation of strategies to increase the number and focus areas of career and technical education teachers)

Intended recipients of the TA include DEED, LEA leaders, educator preparation programs, and potential and current educators.

Alignment to Regional Center Requirements

- **Implementing Alaska's ESEA Consolidated State Plan** section pertaining to disproportionate rates of access to effective educators (Alaska DEED, 2017)
- Implementing, scaling up, and sustaining **evidence-based programs and practices** related to addressing educator shortages
- Addressing the **unique educational obstacles faced by underserved populations**
- If there is interest, the project may also be enhanced to **support ESEA program improvements** around data collection and reporting to ensure that low-income and minority children in Title I schools are not served at disproportionate rates by ineffective, out-of-field, and inexperienced teachers, per the state's recent monitoring report (Office of Elementary and Secondary Education, 2023a)

Responsible Personnel

Barbara Adams (SME), Cortney Rowland (EDNW), and Rebecca Jones (Child Trends)

Key Partners

Barbara Adams, DEED, National Center for Grow Your Own, Alaska Superintendents Association, Alaska Association of Elementary and Secondary School Principals, Association of Alaska School Boards, Alaska Association School Business Officials, REL Northwest

Milestones	Outputs
<p><i>(Year 1, Quarters 1 and 2)</i></p> <ul style="list-style-type: none"> Develop, implement, and support an enhanced communication plan in collaboration with partners to share the findings of the TRR Action Plan with necessary stakeholders 	<ul style="list-style-type: none"> Communication plan
<p><i>(Year 1, Quarters 3 and 4 and Year 2, Quarters 1 and 2)</i></p> <ul style="list-style-type: none"> Support district efforts to develop and implement local-level TRR action plans 	<ul style="list-style-type: none"> LEA TRR plans
<p><i>(Year 1, Quarters 3 and 4 and Year 2, Quarters 1 and 2)</i></p> <ul style="list-style-type: none"> Create an implementation network of local, regional, community, and state stakeholders who convene quarterly and share best practices related to the implementation of the action plan 	<ul style="list-style-type: none"> Convening materials Documented lessons learned, report-outs, and takeaways
<p><i>(Year 2)</i></p> <ul style="list-style-type: none"> Work with DEED and additional partners to continue to ensure the action plan and local efforts to implement the action plan are aligned with and coherent to other relevant systems focused on teacher talent development Support the development of a monitoring plan and process Collaborate with REL Northwest to measure the success of implementation of the TRR Action Plan 	<ul style="list-style-type: none"> Quarterly report-outs about implementation of local TRR plans Monitoring and evaluation reports
<p><i>(Years 3–5)</i></p> <ul style="list-style-type: none"> Develop plans for supporting the scale, sustainability, and continuous improvement of strategies, policies, practices, and programs outlined in action plans 	<ul style="list-style-type: none"> Scale and sustainability plans

Outcomes

Short-Term

- Expanded understanding and knowledge of evidence-based practices to address locally specific educator shortages
- At least 75 percent of districts have developed a local TRR plan

Medium-Term and Long-Term

- Decrease in teaching positions that districts are unable or find difficult to fill
- Increase in percentage of teachers retained in the teaching profession for 3+ years
- Increase in percentage of teachers who stay teaching in the state
- Decrease in emergency certificates

Dissemination

The Alaska Addressing Educator Shortages project will make available all local-level TRR plans for learning and cross-state connections. Materials will also be made available to the CC Network.

A candidate for additional or future work, based on our conversations with DEED and through our review and understanding of the Alaska's needs and priorities, includes:

Increasing student participation and persistence in career and technical education (CTE)

programming. R11CC will collaborate with DEED to enhance data systems to identify students who participate and persist in CTE programming statewide and at the district level, then work with CTE educators to use this data to drive program improvement. Participating districts will be empowered to use data to explore student engagement in CTE programming, choose actionable evidence-based activities to address observed gaps, and implement changes using a structured planning tool.

Idaho State Department of Education (SDE) Service Plan

In 2022, Idaho was geographically the 14th largest state but only the 38th most populous. Like Alaska, Idaho's large size and small population make it one of the most rural states in the nation (Idaho Department of Health & Welfare, n.d.). Six federally recognized Tribes live across Idaho. Four refugee centers welcome over 1,000 people per year, putting Idaho in the top three states per capita in number of arrivals (Idaho Office for Refugees, n.d.).



Superintendent of Public Instruction: Debbie Critchfield
First elected 2022; Current term ends January 4, 2027

Governor: Brad Little
First elected 2018; Current term ends January 4, 2027

Idaho by the Numbers

- In the 2022–23 school year, Idaho had **186 school districts with 795 public schools** that served 317,555 students (NCES, 2023b).
 - One-third of Idaho students **attend schools in rural areas; a majority of rural schools are in fringe areas** (i.e., less than 10 miles from an urbanized area; NCES, 2022).
 - Students in Idaho are **primarily white or Hispanic** (NCES, 2024a).
 - Idaho has a **lower percentage of English learner students** than the national average (5.8% compared to 10.6% nationwide; NCES, 2024c).
-

-
- The state has **fewer students eligible for free or reduced-price lunch** compared to the national average (35.1% compared to 53.3% nationwide; NCES, 2024b).
 - **Student performance in Idaho is similar to or above the national average.** For example, NAEP scores are within one point of the national average in grade 4 math and reading and nine and five points higher in grade 8 math and reading, respectively (see table 5).
 - **Graduation rates are lower** than the national average (80% compared to 87% nationwide; NCES, 2024d).
 - **Retention of early-career teachers is low and trending down.** The five-year retention rate of first-year teachers ranged between 63 percent to 68 percent over the past five years (Idaho State Board of Education, 2023).
-

Idaho's 2025–2029 strategic plan for K–20 education (Idaho State Board of Education, 2024) has four pillars: educational system alignment, educational readiness, educational attainment, and workforce readiness. These pillars collectively create an effective pathway from kindergarten through higher education and into the workforce by focusing on early literacy, educational readiness, workforce alignment, and recruiting and retaining quality educators.

Ensuring that all students can read proficiently by the end of grade 3 is a top priority. Idaho has made significant investments in literacy programs, including summer reading initiatives and full-day kindergarten, to support this goal. Additionally, Idaho is committed to improving achievement in math.

Through systems alignment, Idaho wants to ensure that all levels of education, from kindergarten to higher education, work cohesively to provide a comprehensive and efficient learning experience. This includes aligning curricula and standards to smooth transitions between educational stages, reducing redundancy, and enhancing the overall quality of education.

Recruiting and retaining quality educators statewide is also a priority. Recognizing the impact that skilled teachers have on student outcomes, Idaho is investing in the career ladder system, developing strategies to attract top talent to Idaho schools, and providing ongoing professional development and support to retain them.

Idaho Project 1. Teacher Mentoring

R11CC will provide TA to Idaho SDE to build capacity, tools, and systems for the Idaho Teacher Mentoring program to be effective and sustainable.

Background, High-Leverage Problem, and Identified Need

In a 2023 report, the Idaho State Board of Education (SBOE) said that LEAs across Idaho have identified staffing as a major concern; in addition, data show that Idaho schools struggle to fill open teaching positions and that the state has a low five-year teacher retention rate (Idaho SBOE, 2023). Idaho has identified effective teacher mentoring as one evidence-based approach to support the professional growth, development, and retention of educators and, in turn, address LEA-identified challenges related to staffing. In fact, Idaho mandates the provision of comprehensive support for teachers in their first two years in the profession, emphasizing mentoring, peer assistance, and professional development as essential components of this support framework (Idaho Code § 33-1201A, n.d.) In 2017, Idaho also developed mentoring standards to provide general guidance on developing mentoring programs locally (Professional Standards Commission, 2017). However, while there is a platform to house materials related to the standards, the state has not yet developed any tools or trainings.

Additionally, Idaho SDE, in partnership with the SBOE, launched an online mentoring platform. SDE is currently assuming oversight over the program from SBOE.

As this transition takes place, SDE has identified a need for strategic planning, capacity building, and implementation of evidence-based practices to ensure the program's effectiveness and sustainability.

Scope of Services and Intended Recipients

This project will support SDE to build tools, trainings, and processes based on the Idaho Mentor Program Standards. In years 1–2, we will focus on standards in Domain 1: Program Design, Sponsorship, and Leadership. We will develop tools to help districts and schools understand school and community context; define program rationale, goals, design, and participation; identify program sponsorship; and assign roles and responsibilities of district administrators, school boards, and union leaders.

Since the Idaho Mentor Program Standards have been in place for almost seven years, we will begin our work with a statewide scan of existing district practices. Findings from the scan will inform a state-level logic model as well as the development of trainings and resources that will be housed on the existing mentoring platform. The statewide scan will also identify Idaho districts that are currently implementing evidence-based mentoring practices and have low percentages of open positions and higher rates of retention compared to the state average. We will invite representatives from these districts to participate in a working group with SDE and SBOE staff members to support development of the trainings and resources that will be made available statewide. Their participation will ensure we can build on successful local implementation practices, draw on input from diverse regions of the state, and create products that will be directly relevant for Idaho schools and districts.

Intended recipients of TA include SDE staff members, district leaders, and teachers.

Alignment to Regional Center Requirements

- **Implementation of Idaho's Consolidated State Plan** section pertaining to disproportionate rates of access to effective educators (Idaho SDE, 2019)
- Implementing, scaling up, and sustaining **evidence-based programs and practices** related to addressing educator shortages
- Addressing the **unique educational obstacles** faced by underserved populations

- This project will **support ESEA program improvements** around data collection and reporting to ensure that low-income and minority children in Title I schools are not served at disproportionate rates by ineffective, out-of-field, and inexperienced teachers, per the state’s recent monitoring report (Office of Elementary and Secondary Education, 2023)

Responsible Personnel

Jennifer Esswein (EDNW) and Obioma Okogbue (Child Trends)

Key Partners

Idaho State Board of Education

Milestones	Outputs
<p><i>(Year 1, Quarter 1)</i></p> <ul style="list-style-type: none"> • Conduct a statewide scan of existing mentoring programs with the purpose of establishing a comprehensive understanding of current mentoring efforts to build shared knowledge and trust among stakeholders 	<ul style="list-style-type: none"> • Summary report including district mentoring practices and district rates of recruitment and retention
<p><i>(Year 1, Quarter 3; Ongoing Throughout the Project)</i></p> <ul style="list-style-type: none"> • Identify and convene working group members with the purpose of ensuring broad representation of stakeholders and collaborative relationships 	<ul style="list-style-type: none"> • State-level logic model and measurement plan for Domain 1 of Mentoring Standards
<p><i>(Year 2, Quarter 2)</i></p> <ul style="list-style-type: none"> • Train working group members and SDE staff members on logic modeling to equip stakeholders with the skills needed for effective program planning and implementation 	<ul style="list-style-type: none"> • Evidence-based tools and trainings tailored to the Idaho context
<p><i>(Years 2–5)</i></p> <ul style="list-style-type: none"> • Develop living tools and resources collaboratively with stakeholders to ensure that materials are informed by continuous feedback and improvement 	

Outcomes

Short-Term

- Understand existing Idaho mentoring programs and current rates of educator recruitment and retention
- Increased transparency and understanding of the mentoring program

Medium- and Long-Term

- 50 percent of districts implement the state’s evidence-based tools and trainings.
- By 2026, a 10 percent reduction in educator positions that districts report as unable or difficult to fill.
- By 2030, a 20 percent reduction in positions reported as unable or difficult to fill.
- By 2026, a 10 percent increase in the percentage of educators that remain in Idaho as educators after three years. By 2030, a 25 percent increase in the percentage of educators that remain in Idaho as educators after three years.

Dissemination

The Idaho Teacher Mentoring Project will disseminate local-level teacher mentoring programs and practices through virtual convenings and tools and materials available on the SDE website. Materials will also be made available to the CC Network.

Idaho Project 2. Continuous Improvement for State-Delivered Federal Programs Services

R11CC will work with SDE's Federal Programs team to improve program alignment and implement continuous improvement practices.

Background, High-Leverage Problem, and Identified Need

SDE's Federal Programs Department meets regulations and provides assistance to school districts under the requirements of the ESEA. Department staff members accomplish this by implementing federal program monitoring to ensure districts are compliant with the law. Currently, EDNW's team at Region 17 CC is supporting SDE's Content and Curriculum Team to do this work.

This project will support the team to move beyond compliance to a culture of continuous improvement—identifying inputs, outputs, and outcomes of their services.

SDE has requested support to move to a culture of continuous improvement that will ultimately improve federal program outcomes for students across the state.

Scope of Services and Intended Recipients

The purpose of this project is to support SDE's Federal Programs team to connect program-level inputs, outputs, and outcomes. Department staff members will create one logic model and measurement plan for each federal program and will also develop a plan for continuous improvement over time. R11CC will work with all Federal Programs staff members but we will provide additional support to staff members who oversee Title I-A: Improving Basic Programs as they support schools identified for CSI.

Intended recipients of TA include SDE staff members.

Alignment to Regional Center Requirements

- Implementation of Idaho's **Consolidated State Plan** section pertaining to Title I, Part A (Idaho SDE, 2019)
- Implementing, scaling up, and sustaining **evidence-based programs and practices** across content areas
- Addressing the **unique educational obstacles faced by underserved populations**
- If there is interest, the project may also be enhanced to **support ESEA program improvements** around data collection and reporting related to school improvement and school improvement funds, per the state's recent monitoring report (Office of Elementary and Secondary Education, 2023b)

Responsible Personnel

Jennifer Esswein (EDNW) and Ben Cronkright (Child Trends)

Key Partners

Idaho State Board of Education

Milestones	Outputs
<p><i>(Year 1, Quarter 1)</i></p> <ul style="list-style-type: none"> Develop and conduct training on connection across inputs, outputs, and outcomes to establish a shared understanding of how components of the federal programs interconnect to achieve outcomes 	<ul style="list-style-type: none"> Training materials on logic modeling and measurement planning
<p><i>(Year 1, Quarter 2)</i></p> <ul style="list-style-type: none"> Co-develop program-level logic models that will guide program implementation and continuous improvement 	<ul style="list-style-type: none"> Program-level logic models
<p><i>(Year 1, Quarter 3)</i></p> <ul style="list-style-type: none"> Develop and conduct training on measurement planning and formative and summative evaluation 	<ul style="list-style-type: none"> Training materials on measurement planning and formative and summative evaluation
<p><i>(Year 1, Quarter 4)</i></p> <ul style="list-style-type: none"> Co-develop program-level measurement plans 	<ul style="list-style-type: none"> Program-level measurement plans
<p><i>(Years 2–5)</i></p> <ul style="list-style-type: none"> Integrate evaluation findings to refine and expand programs to make evidence-informed adjustments to program services Co-develop ongoing timeline for revisiting logic models and measurement plans for refinement of program services 	
Outcomes	
<p><i>Short-Term</i></p> <ul style="list-style-type: none"> Federal Programs staff members can apply general logic model training to their own program(s) Federal Programs staff members can align measures to outcomes in their program-level logic model Federal Programs staff members can apply a continuous improvement cycle to monitor progress as defined in program-level logic models and measurement plans 	
<p><i>Medium- and Long-Term</i></p> <ul style="list-style-type: none"> Programs show evidence of positive growth on 80 percent of program-level measures 	
Dissemination	
<p>The Region 11 Federal Programs Alignment and Continuous Improvement Project will disseminate logic model and continuous improvement materials across agency staff members. Materials will also be made available to the CC Network.</p>	

A candidate for additional or future work, based on our conversations with SDE and through our review and understanding of Idaho's needs and priorities, includes:

Modernizing school funding formula. In partnership with SBOE, we will support modernization of the school funding formula to ensure equitable and adequate resources for all students in Idaho. This will include support for analyzing the current formula and developing recommended adjustments to align with student needs.

Montana Office of Public Instruction (OPI) State Service Plan

Montana is the fourth largest state in the country yet ranks 43rd in population based on the 2020 census. Like fellow Region 11 states Alaska and Idaho, Montana is one of the most rural states in the nation, ranking 48th in



Montana

Superintendent of Public Instruction: Elsie Arntzen
First elected 2016; Current term ends January 6, 2025

Governor: Greg Gianforte
First elected 2020; Current term ends January 6, 2025

population density. There are 12 federally recognized Tribes across the state, including one that has no reservation in Montana (Division of Indian Education, 2015).

Montana by the Numbers

- In the 2022–23 school year, Montana had **480 districts with 826 public schools** that served 150,733 students (NCES, 2023b).
 - Around one-quarter of **students in Montana attend schools in cities, and over one-third attend schools in rural areas**. A majority of students attending rural schools are in remote areas (NCES, 2022).
 - Students in Montana are **primarily white or AI/AN** (NCES, 2024a).
 - The state has a **lower percentage of English learner students** than the national average (2.4% compared to 10.6% nationwide; NCES, 2024c).
 - The state has **fewer students eligible for free or reduced-price lunch** compared to the national average (18.7% compared to 53.3% nationwide; NCES, 2024b).
 - **Student performance in Montana is generally above the national average**. For example, in 2022, NAEP scores were between two and four points above the national average across subjects and grades (see table 5). However, according to the state's 2022–2023 report card, less than half of students are proficient in math (Montana OPI, 2022–2023).
 - **Graduation rates are similar** to the national average (86% compared to 87% nationwide; NCES, 2024d).
-

Montana identified several educational priorities in its *Putting Montana Students First* plan (Montana OPI, 2023), including recruiting and retaining quality educators; improving math and reading skills; expanding partnerships with industry, the military, and postsecondary institutions; and enhancing effective family, student, and community engagement.

Recruiting and retaining quality educators remains a critical priority in Montana. The *Montana Teach* initiative celebrates teacher excellence and extends leadership opportunities while addressing retention and recruitment. This commitment underscores the state's recognition of the essential role of educators.

Recognizing the importance of math and reading to academic success, OPI established *Montana Learn*. The initiative aims to implement targeted interventions and innovative teaching strategies to enhance student performance in these critical areas, particularly in middle school, and build a strong foundation for students.

The *Montana Ready* initiative expands partnerships with industry, the military, and postsecondary institutions with the goal to prepare students for life beyond the classroom by providing them with practical skills and real-world experiences.

Montana Hope aims to enhance effective family, student, and community engagement by promoting student voice and fostering educational environments in which families and community members actively participate. This initiative acknowledges the vital role of a supportive and involved community in student success.

Montana Project 1. Learning Standards

R11CC will collaborate with OPI to create supports for districts, Tribes, schools, and teachers to effectively implement math learning standards.

Background, High-Leverage Problem, and Identified Need

From 2022–2024, per scheduled review and in response to student performance trends, OPI collaborated with the Region 17 CC at EDNW to revise the state’s math content standards, which Montana will adopt in September 2024. Concurrently, in 2024–25 schools across Montana will conduct a new state summative assessment.

At this time, OPI lacks a rigorous and coherent plan to support educators to implement the new standards. As the new standards and new assessment converge, OPI requested R11CC assistance to develop and carry out a plan to communicate the new math standards and support implementation. High-quality implementation of the new standards and assessment are vital to address the state’s needs related to improving math proficiency, particularly for underserved students.

Scope of Services and Intended Recipients

This project will support OPI to create conditions and activities that guide Montana teachers to use the new math standards to drive instructional planning. In line with our TA approach, year 1 will focus on co-developing and initiating an implementation plan. R11CC will collaborate with OPI leadership to identify implementation support team members. In year 1, R11CC staff members will guide OPI to clearly define what it means to implement the standards (e.g., Usable Innovations). Our clear definition statement will inform the development of implementation guides for each grade (K–12) as well as a fidelity of implementation tool to monitor the implementation of standards-based instruction and support teachers’ continuous growth. The implementation team will determine readiness of the field, implement and monitor implementation, and engage in improvement cycles by collecting data and providing feedback. Finally, the team will develop a communication and dissemination plan to explain the revised standards and expectations for practitioners and students to all Montana schools.

Implementation of the revised math standards will not be optional for Montana teachers in 2025. However, limited resources and best implementation practice require that the OPI implementation team focus on a small group of practitioners in year 1 (i.e., the pilot group). R11CC and OPI will review data on school performance and teacher experience/demographics to create criteria to determine which schools to include in the pilot group, with a priority toward high-needs schools and underserved student populations. R11CC and OPI will then co-develop professional learning sessions and coaching models for teachers in the pilot group. At the end of year 1, R11CC will support OPI to provide intensive training and coaching to the pilot group. As implementation begins, R11CC will support the OPI team to use the developed fidelity of implementation tool to collect data for continuous improvement. In year 2, systematic data collection will occur through interviews and focus groups to identify implementation successes, challenges, and potential solutions.

Intended recipients of TA include OPI staff members, district and school leaders, and teachers.

Alignment to Regional Center Requirements

- **Implementation of the state’s Consolidated State Plan** section pertaining to Title I, Part A, particularly “Challenging State Academic Standards and Assessments” (Montana OPI, 2018b)
- Implementing, scaling up, and sustaining **evidence-based programs and practices in math**
- Addressing the **unique educational obstacles faced by underserved populations**, particularly the need for equitable and rigorous learning standards to accelerate academic improvements and learning loss recovery
- **Improving implementation of ESEA programs:** Title I, Part A and Title II, Part A

Responsible Personnel

Jacob Williams, RunningHorse Livingston, and Jennifer Johnson (EDNW)

Key Partners

The Center for Standards, Assessment, and Accountability. In addition, Washington OSPI will serve as a thought partner given its similar project on learning standards (see project description in Washington state service plan below).

Milestones	Outputs
<p><i>(Year 1, Quarter 1; Ongoing)</i></p> <ul style="list-style-type: none"> Convene the OPI implementation team to coordinate and carry out work with pilot schools 	<ul style="list-style-type: none"> Logic model and one-year action plan for participating pilot schools
<p><i>(Year 1, Quarters 1 and 2)</i></p> <ul style="list-style-type: none"> Identify pilot schools and develop readiness assessment 	<ul style="list-style-type: none"> Summary report of data review Readiness survey and results List of participating pilot schools
<p><i>(Year 1, Quarters 1–3)</i></p> <ul style="list-style-type: none"> Develop foundation for professional learning 	<ul style="list-style-type: none"> Document that identifies differences between the revised standards and the previous version Practice profiles related to each standard, scope, and sequences Document that outlines essential functions for the standards in relation to a teacher’s day-to-day work Fidelity tool for standards implementation Communication and dissemination plan
<p><i>(Year 1, Quarter 4)</i></p> <ul style="list-style-type: none"> Develop and implement training tools for pilot schools 	<ul style="list-style-type: none"> Draft facilitator and participant materials for professional learning series Draft implementation guidance document
<p><i>(Year 2, Quarter 1)</i></p> <ul style="list-style-type: none"> Design evaluation of mathematics standards implementation 	<ul style="list-style-type: none"> Finalized facilitator and participant materials for professional learning series Plan for continuous improvement
<p><i>(Year 2, Quarters 1–4)</i></p> <ul style="list-style-type: none"> Implement standards implementation evaluation activities Develop year 3 continuous improvement support plan 	<ul style="list-style-type: none"> Evaluation report of standards implementation Revised professional learning materials; implementation plan to achieve increased fidelity of implementation across Montana
<p><i>(Years 3–5)</i></p> <ul style="list-style-type: none"> Design ongoing professional development for standards implementation Implement mathematics standards implementation continuous improvement plan 	<ul style="list-style-type: none"> Evaluation report of mathematics standards implementation (annual) Revised professional learning materials (annual)

Outcomes

Short-Term

- 100 percent of the OPI staff members involved in the standards implementation report increased knowledge related to successfully implementing new programs/innovations
- 75 percent of pilot schools indicate preparedness to implement the standards in the 2024–25 school year

Medium- and Long-Term

- 75 percent of Montana schools indicate preparedness to implement the revised math standards in the 2025–26 school year
- Data collected in evaluation activities demonstrate 80 percent fidelity of math standards implementation

Dissemination

The Montana OPI Learning Standards Project will disseminate standards implementation guidance documents as well as the standards implementation evaluation report. R11CC will also collaborate with OPI and Washington OSPI to disseminate a cross-state highlight, case study, tool, or resource for the field given their parallel work related to math and ELA standards reform. Materials will also be made available to the CC Network.

Montana Project 2. Comprehensive School Reform – More Rigorous Intervention

R11CC will co-develop with OPI a model for intensive support planning and implementation for schools failing to exit CSI status.

Background, High-Leverage Problem, and Identified Need

In spring 2024, OPI identified 17 CSI schools that had not demonstrated sufficient improvement in the three years after CSI identification to exit the qualification. As mandated by the state ESSA plan, these schools were identified for more rigorous intervention. Montana’s original ESSA plan said more rigorous intervention would consist of “support through additional interventions and intensive support from a three-person OPI and district-level team” (Montana OPI, 2018a, p. 33). Realizing this language was not sufficient, OPI collaborated with the U.S. Department of Education in spring 2024 to amend its plan to say that when adequate progress toward goals is not made, OPI will collaborate with and build the capacity of school leaders to identify necessary actions and/or interventions.

Beyond ESSA language, OPI has no documented process or plan to support schools identified for more rigorous intervention. Additionally, the OPI framework for staff to provide direct support for more rigorous intervention for CSI schools is undefined. Currently, the OPI school improvement team consists of four people. There is limited human capacity to distribute across a vast geographic area, making it challenging for OPI to provide “intensive” support directly to schools in need.

Scope of Services and Intended Recipients

OPI approached Region 17 CC at EDNW in winter 2023 for assistance in developing a short guidance document for schools that would not exit CSI status and would be required to receive more rigorous intervention. Moving forward, OPI must develop tools and resources to guide schools through the

more rigorous intervention planning process as well as an implementation plan to clearly define and implement the interventions. OPI intends to closely align the state's school accreditation process with its school improvement process. OPI is tasked by state law to accredit all schools in Montana. The administrative rules of Montana (ARM) related to school accreditation (ARM Chapter 55) were revised in 2023; a component of the rules requires each school to complete an Integrated Strategic Action Plan (ISAP) that guides its continuous improvement process (ARM 10.55.601). OPI intends for schools identified for rigorous intervention to use their ISAP as their school improvement plan.

Year 1 of the project will include two components. First, R11CC and OPI will co-develop initial evidence-based guidance and processes for schools to develop and implement improvements. Second, R11CC will support OPI to learn from invested partners in school improvement across the state to identify what opportunities exist and what is needed from OPI to better support school improvement, filling gaps in the initial guidance. This process will be grounded in the Circles of Reflection framework (Smoker Broaddus & Bitterman, 2023). Among the schools identified for more rigorous intervention, the average Native student population is 64 percent. Therefore, it is essential that OPI engage Native communities to identify how to focus school improvement efforts to meet local needs.

Intended recipients of TA include OPI staff members, district administrators, and school leaders.

Alignment to Regional Center Requirements

- **Implementation of the state's Consolidated State Plan section pertaining to Title I, Part A**, particularly "Statewide Accountability System and School Support and Improvement Activities" and CSI schools (Montana OPI, 2018b)
- Implementing, scaling up, and sustaining **evidence-based programs and practices** for school improvement
- Addressing the **unique educational obstacles faced by underserved populations**, particularly those in CSI schools
- Improving **implementation of ESEA programs**, particularly for CSI schools

Responsible Personnel

Jacob Williams (EDNW), Catherine Barbour (EDNW), and Silvana Hackett (Child Trends)

Key Partners

OPI Office of School Improvement, Montana Advisory Council on Indian Education, National Center on Improving Literacy, National MTSS Center

Milestones	Outputs
<p><i>(Year 1, Quarter 1)</i></p> <ul style="list-style-type: none"> • Assess current state of school improvement efforts 	<ul style="list-style-type: none"> • Inventory of current school improvement practices
<p><i>(Year 1, Quarters 1 and 2)</i></p> <ul style="list-style-type: none"> • Engage school partners in Circles of Reflection 	<ul style="list-style-type: none"> • 90-day action plan
<p><i>(Year 1, Quarters 2, 3, and 4)</i></p> <ul style="list-style-type: none"> • Develop support materials 	<ul style="list-style-type: none"> • Guidance documents and tools for schools identified for more rigorous intervention • Webinars/trainings to disseminate developed guidance and support school improvement practices

<p><i>(Year 2)</i></p> <ul style="list-style-type: none"> • Co-develop with OPI a plan for implementing support for schools identified for more rigorous intervention • Develop a monitoring plan for school implementation of ISAPs as well as OPI provision of support • Collect feedback from school partners in year 1 on developed guidance tools • Implement feedback from schools to revise guidance tools 	<ul style="list-style-type: none"> • Revised guidance documents and tools for schools identified for more rigorous intervention • Report that synthesizes feedback collected from schools • OPI school improvement implementation and monitoring plans • Updated trainings to support implementation of school improvement practices
<p><i>(Years 3–5)</i></p> <ul style="list-style-type: none"> • Collect feedback from school partners on OPI’s school improvement implementation and monitoring • Collaborate to revise OPI school improvement implementation and monitoring plans • Facilitate Circles of Reflection with newly identified and existing schools identified for more rigorous intervention 	<ul style="list-style-type: none"> • Revised OPI school improvement implementation and monitoring plans • Revised guidance documents and tools for schools identified for more rigorous intervention • Updated trainings to support implementation of school improvement practices

Outcomes

Short-Term

- OPI demonstrates increased capacity for developing specific SEA plans to support school improvement

Medium- and Long-Term

- 90 percent of schools identified for more rigorous intervention express satisfaction with OPI guidance
- 75 percent of schools identified for more rigorous intervention demonstrate positive progress on ISAP goals
- OPI demonstrates increased capacity for developing specific SEA plans to support school improvement

Dissemination

The Montana OPI Comprehensive School Reform – More Rigorous Interview project will disseminate evidence-based practices for innovative SEA support for CSI schools and share examples and stories of LEA/SEA collaboration through virtual opportunities and at state and national conferences. Materials will also be made available to the CC Network.

Two candidates for additional or future work in the state, based on our conversations with OPI and through our review and understanding of Montana’s needs and priorities, include:

- **Statewide implementation of new through-year accountability assessment.** To support successful adoption and implementation of the new through-year assessment, R11CC will support OPI in developing professional learning related to the assessment. We will provide OPI with evidence-based resources containing the components of effective professional learning to ensure the learning design is of the highest quality. In addition, R11CC will help OPI determine the essential information related to the assessment within each domain of knowledge. Before OPI designs the professional learning sessions, we will survey and interview teachers who participated in pilot testing for the new assessment to identify key concepts they perceive essential for all implementers to know and understand.
- **Montana Teacher Residency Demonstration Project.** R11CC will continue to build OPI's capacity to scale the Montana Teacher Residency Demonstration Project pilot—a successful residency program that aims to prepare and retain effective teachers in the state's highest-need communities and is currently supported by our team at Region 17 CC. Current cohorts of the residency are funded by the state, but OPI would like to expand using federal apprenticeship funds. The first step will be to ensure core staff members at OPI clearly understand the essentials of apprenticeship programs. R11CC will facilitate collaborative sessions with OPI and the Montana Department of Labor to reach consensus on essential components to inform the drafting of a scaling action plan. More information about this project can be found in section C2.

Oregon Department of Education (ODE) State Service Plan

Oregon is the ninth largest state by area and 27th in population based on the 2020 census .

Though there are nine federally recognized Tribes across the state, eight additional Tribes share geography with Oregon.

The state's largest city, Portland, has the ninth largest urban Indian population in the country (The Oregon Land Justice Project, n.d.).



Oregon

Superintendent of Public Instruction Dr. Charlene Williams
Appointed September 2023

Governor: Tina Kotek
First elected 2022; Current term ends January 6, 2027

Oregon by the Numbers

- In the 2022–23 school year, Oregon had **222 districts with 1,286 public schools** that served 552,380 students (NCES, 2023b).
- Over one-third of Oregon **students attend schools in cities, and almost half attend schools in suburban areas and towns** (NCES, 2022).
- Students in Oregon are **primarily white or Hispanic** (NCES, 2024a).
- Oregon has a **lower percentage of English learner students** than the national average (9.5% compared to 10.6% nationwide; NCES, 2024c).
- **More students are eligible for free or reduced-price lunch** compared to the national average (55.3% compared to 53.3% nationwide; NCES, 2024b).
- **Student performance in Oregon is generally lower than the national average.** For example, in 2022, NAEP scores were between two and seven points lower than the national average across subjects and grades (see table 5).
- **Graduation rates are lower** than national average (81% compared to 87% nationwide; NCES, 2024d).

Oregon has structured its priorities to address both the immediate and long-term needs of the educational system, especially in the context of challenges highlighted by the COVID-19 pandemic. The primary goal is to ensure that students graduate high school with the necessary skills and knowledge to succeed in college and careers. Oregon also has a strong focus on closing the achievement gap, ensuring that all students have equitable opportunities to succeed. Research suggests that Oregon students as a whole have not regained either their reading or math skills since the pandemic; the state's elementary and middle school students remain an average of about two-thirds of a year behind in reading compared to pre-pandemic levels and three-fourths of a year behind in math, which is about two to three times the deficit faced by students nationwide (Fahle et al., 2024).

ODE's strategic plan emphasizes providing consistent and high-quality educational experiences throughout PK–12 (ODE, n.d.-c). This includes supporting early education so every student enters school ready to learn; providing support to meet expected grade-level outcomes; and graduating students from high school prepared for college, career, and civic life.

The state is also revamping accountability systems to better reflect the diverse needs of students. The state developed multiple student success plans focused on specific populations (ODE, n.d.-b) and invests in several programs under the Early Literacy Success Initiative, including Early Literacy Success School District Grants, Community Grants, Tribal Grants, the Birth through Five Literacy Plan, and the Early Literacy Educator Preparation Council established in 2023.

Oregon Project 1. Language Revitalization Through Early Literacy Tribal Consultation

R11CC will support ODE's Office of Indian Education to implement Early Literacy Tribal Grants initiatives that provide AI/AN students and families with culturally affirming literacy and language development support.

Background, High-Leverage Problem, and Identified Need

In 2023, the Oregon Legislature enacted the Early Literacy Success Initiative (HB 3198) to enhance culturally and linguistically responsive early literacy programs, promote family engagement, offer professional training for direct service staff, and implement equitable statewide early literacy programs. The bill set aside \$2 million for Early Literacy Tribal Grants to provide AI/AN students and families with culturally affirming literacy and language development support that honors their heritage language. Tribes can use the noncompetitive grant funds to expand language revitalization initiatives and learn from one another. With a focus on integrating early learners, these initiatives foster a deep connection to students' heritage through their Native languages and ground them in their unique cultural environments. These efforts will preserve languages and nurture a new generation of speakers who are well versed in the linguistic traditions of their ancestors.

Early Literacy Tribal Grants are flexible to support high-dosage tutoring programs and training aligned with research-based literacy strategies as well as language revitalization initiatives of Oregon Tribes. The initiative reflects Oregon's broader commitment to Tribal sovereignty and evidence-based early literacy practices. It is complemented by ODE's Tribal consultation toolkit (2023), which guides LEAs to collaborate with the nine federally recognized Tribes in the state, and early literacy framework (ODE, n.d.-a). Tribal leaders will use the toolkit and framework to craft project plans that align with HB 3198 and the goals of the AI/AN Student Success Plan (ODE, 2020). The project plans will detail how the funds will bolster early literacy and language revitalization.

ODE needs support with communication, facilitating an advisory council, and implementing a continuous learning cycle.

Scope of Services and Intended Recipients

R11CC will support ODE’s Office of Indian Education (OIE) to implement Early Literacy Tribal Grants initiatives. This work will lay the foundation to achieve longer-term objectives to address the unique obstacles AI/AN students face in Oregon, including Native language erasure and a lack of culturally affirming pedagogy. Support will include facilitating planning meetings, creating communication materials, and sharing evidence-based tools and processes with LEAs and Tribal communities.

Intended recipients of TA include ODE, OIE, and Oregon’s Tribal communities.

Alignment to Regional Center Requirements

- **Implementation of Oregon’s Consolidated State Plan section pertaining to Title I, Part A**, particularly “Statewide Accountability System and School Support and Improvement Activities”
- Implementing, scaling up, and sustaining **evidence-based programs and practices** related to literacy, such as high-dosage tutoring
- Addressing the **unique educational obstacles** faced by underserved populations, specifically Native students
- Improving **implementation of ESEA programs**, particularly Title I

Responsible Personnel

Mandy Smoker Broadus, Christine Pitts, and Lymaris Santana (EDNW)

Key Partners

ODE, OIE, Tribal leaders, Oregon Tribal Early Learning Alliance, the Department of Early Learning and Care, and the Educator Advancement Council

Milestones	Outputs
<p><i>(Year 1, Quarters 1 and 2)</i></p> <ul style="list-style-type: none"> • Co-develop a summary of existing services • Create a communication plan and materials with OIE 	<ul style="list-style-type: none"> • Communication plan and materials • Summary of documentation of existing Native language development, revitalization, and early literacy programs’ strengths, opportunities, and intersections with other ODE initiatives
<p><i>(Year 1)</i></p> <ul style="list-style-type: none"> • Support development of an advisory council with OIE, including cross-state Native scholars and Tribal leaders • Identify common and adaptable indicators of success across the Early Literacy Tribal Grants plans as well as culturally affirming ways to measure the indicators 	<ul style="list-style-type: none"> • Documentation of the advisory council’s discussions, recommendations, and any decisions made

<p><i>(Year 2)</i></p> <ul style="list-style-type: none"> • Develop and facilitate communities of practice that engage ODE partners and Tribal leaders in implementation and continuous improvement of the Early Literacy Tribal Grants 	<ul style="list-style-type: none"> • Materials for communities of practice
<p><i>(Years 3–5)</i></p> <ul style="list-style-type: none"> • Continue to engage in a continuous improvement cycle to support Tribal leaders as they document the development and growth of their language revitalization programs (e.g., support Tribes in creating culturally relevant reading materials, storybooks, and educational resources) 	<ul style="list-style-type: none"> • Stories, documentation, and resources highlighting language revitalization programs and learnings from literacy grants • Sustainability plan

Outcomes

Short-Term

- By September 2025, 75 percent of OIE staff report increased their capacity to facilitate government-to-government relationships related to the Early Literacy Tribal Grants
- By June 2026, 75 percent of OIE staff members report increased ability to enact Early Literacy Tribal Grant planning and implementation

Medium- and Long-Term

- 75 percent of OIE staff members report that R11CC helped them build community, networks, and shared knowledge about designing, adapting, and improving early language and literacy programs among Oregon Tribes
- 75 percent of OIE staff members report that R11CC increased their capacity to ensure sustainability for Early Literacy Tribal Grant programs and resources
- 75 percent of agencies and Tribes report that OIE/ODE networks and communication improved their ability to plan for and adapt their Early Literacy Tribal Grant initiatives
- 80 percent of OIE staff members report that R11CC increased their capacity to support continuous improvement and sustainability for Early Literacy Tribal Grants and language revitalization

Dissemination

The Region 11 Language Revitalization through Early Literacy Tribal Consultation project will disseminate stories and resources highlighting language revitalization programs and learnings from literacy grants. Materials will also be made available to the CC Network.

Oregon Project 2. Multilingual Learner Reporting Guidance

R11CC will leverage EDNW's existing partnership with ODE (developing a statewide multilingual learner strategic plan) to develop capacity and efficiencies for reporting on English learner student services and outcomes.

Background, High-Leverage Problem, and Identified Need

LEAs across Oregon are expected to report information about their policies, procedures, and services for English learner-classified students to fulfill federal and state requirements. Currently, federal and

state programs operate in different offices within ODE. According to the director of the newly formed Multilingual and Migrant Education Department, the siloing of related departments has led to redundancy in reporting requirements and additional administrative burdens for LEAs. Moreover, ODE staff members do not have a comprehensive picture of how English learner funds are used to support students. In a soon-to-be-released multilingual learner statewide strategic plan—developed in partnership between ODE and EDNW—ODE commits to improve coordination of internal systems to streamline state and federal reporting requirements. This activity will help ODE gain a more comprehensive picture of local practices. LEAs would benefit from more clear guidance on how to collect, analyze, evaluate, and report data on English learners to different governing bodies.

Under ESSA, Title III monitoring is required for ODE to review and verify district compliance with implementing Title III English Learners and Immigrant Youth programs, implementing Title I-A programs for students living in poverty, and Oregon laws and regulations regarding English learners. ODE's Title III monitoring process focuses on quality and compliance with state and federal requirements for programming for English learners, immigrants, and refugees

ODE needs support to reduce the burden on districts to report compliance information.

Scope of Services and Intended Recipients

ODE's Title III monitoring process aims to raise awareness among school districts and educational service districts about federal funding requirements. R11CC will help ODE self-assess against grant requirements internal to the state as well as federal reporting requirements to understand how to optimize funding for services benefiting English learners. Our goal is to move beyond compliance-focused practices and provide evidence-based, high-impact support from ODE to LEAs. By evaluating and improving data reporting processes, we can identify areas for TA and capacity building. This ensures better use of federal funds by Title III services and state grant funds for English learner services. Intended recipients of TA include ODE staff members and school district staff members involved in Title III monitoring, including school leaders.

Alignment to Regional Center Requirements

- Implementation of Oregon's **Consolidated State Plan** section pertaining to Title III
- Implementing, scaling up, and sustaining **evidence-based programs and practices**
- Addressing the **unique educational obstacles faced by underserved populations**, specifically English learners
- If there is interest, the project may be enhanced to **support ESEA program improvements** around data collection and reporting related to English learners, per the state's recent monitoring report (Office of Elementary and Secondary Education, 2023c)

Responsible Personnel

Manuel Vazquez (EDNW) and Tameka Porter (Child Trends)

Key Partners

Multilingual and Migrant Education (MME) at ODE

Milestones

(Year 1, Quarters 1 and 2)

Outputs

- Landscape scan of existing data collection and reporting requirements

<ul style="list-style-type: none"> • Conduct landscape scan of the existing data collection and reporting requirements across all grants and initiatives relating to multilingual learners • Co-develop a set of essential questions to ground the data collection and reporting framework • Complete an audit alongside the MME team to understand which reporting indicators are essential for regulatory reporting requirements and which indicators are useful for ODE's multilingual learner strategic plan 	<ul style="list-style-type: none"> • Essential questions grounding future reporting frameworks • Audit materials providing data collection and reporting indicators • Action plan that includes evidence-based resources and structures to support implementing ODE's multilingual learner strategic plan in alignment with Title III programming and reporting
<p><i>(Year 1, Quarters 3 and 4)</i></p> <ul style="list-style-type: none"> • Support MME team's implementation of the data guidance 	
<p><i>(Year 2)</i></p> <ul style="list-style-type: none"> • Support monitoring districts in making adaptations to the guidance document • Co-develop data stories alongside the MME team and school districts 	<ul style="list-style-type: none"> • Monitoring plans and reports • Progress stories
<p><i>(Years 3–5)</i></p> <ul style="list-style-type: none"> • Support working group meetings with the MME team and other multilingual or data-focused experts from Region 11 and broadly • Finalize the data collection guidance and share widely • Establish groups of educators, parents, students, and community members who meet regularly to ensure communications and resources about Title III are meaningful, coherent, and accessible • Refine guidance and tools for English learners and their families based on feedback from stakeholders and work toward full implementation 	<ul style="list-style-type: none"> • Materials from working groups • Data collection guidance • Family and community guidance documents

Outcomes

Short-Term

- 80 percent of participating ODE staff members report increased capacity to develop and disseminate guidance and resources that are high quality, relevant, and valuable for Title III monitoring and other multilingual data reporting guidance
- 80 percent of school districts identified for monitoring show evidence that they understand how to use Title III grant funds, in alignment with the multilingual learner strategic plan, to improve services for students designated as English learners
- 75 percent of school districts identified for monitoring report that ODE helped them build awareness of the requirements for Title III and other multilingual reporting requirements
- 75 percent of participating ODE staff members understand the shift in essential questions and indicators that are necessary for multilingual reporting improvements

Medium- and Long-Term

- 80 percent of participating ODE staff members report increased capacity to help school districts self-assess their Title III programming and other multilingual programming against grant requirements and research-based practices
- 80 percent of participating ODE staff members report increased school district capacity to use multilingual learner data for program improvements
- 75 percent of school districts identified for monitoring show evidence that they understand how to collect, aggregate, and report multilingual student and family data across grant programs and initiatives
- Data collected through Title III activities demonstrate 80 percent fidelity to multilingual learner strategic plan and other statewide initiatives
- 80 percent of participating ODE staff members report increased capacity to help school districts more efficiently use multilingual learner data for reporting and school improvement
- 80 percent of participating ODE staff members report increased capacity to develop and disseminate guidance and resources that are high quality, relevant, and valuable for Title III monitoring

Dissemination

The Region 11 Multilingual Learner Reporting Guidance Project will disseminate evidence-based practices to support multilingual learners and their families through virtual and written approaches as well as a case study about alignment and coherence around guidance, data collection and analysis, and reporting of local and state Title programming. Materials will also be made available to the CC Network.

A candidate for additional or future work, based on our conversations with ODE and through our review and understanding of Oregon's needs and priorities, includes:

ODE established funding and guidance through the **Student Success Act for programs aiding historically underserved communities** (ODE, n.d.-b). R11CC and ODE will co-design a reporting framework for student investment accounts tied to each student success plan. This will help ODE track progress and report on investment objectives to communities statewide.

Washington Office of Superintendent of Public Instruction (OSPI) State Service Plan

Washington is the 18th largest state and 13th in population based on the 2020 census. It ranks 22nd in the country for population density, with a majority of the population in the western half of the state. There are

**Washington**

Superintendent of Public Instruction: Chris Reykdal
First elected 2016; Current term ends January 13, 2025

Governor: Jay Inslee
First elected 2012; Current term ends January 13, 2025

29 federally recognized Tribes across the state (Washington OSPI, n.d.-b).

Washington by the Numbers

- In the 2022–23 school year, Washington had **340 districts with 2,549 public schools** that served 1,090,227 students (NCES, 2023b).
 - **Over one-third of students in Washington attend schools in cities**, and an even greater percentage attend schools in suburban areas and towns (NCES, 2022).
 - Students in Washington are **primarily white or Hispanic** (NCES, 2024a).
 - The state has a **higher percentage of English learner students** than the national average (11.4% compared to 10.6% nationwide; NCES, 2024c).
 - **Fewer students in Washington are eligible for free or reduced-price lunch** compared to the national average (49.6% compared to 53.3% nationwide; NCES, 2024b).
 - **Student performance in Washington is similar to or higher than the national average.** For example, in 2022, NAEP scores were similar to the national average in grade 4 and three points over the national average in grade 8 for both math and reading (see table 5).
 - **Graduation rates are lower** than the national average (84% compared to 87% nationwide; NCES, 2024d).
-

Washington's educational priorities include supporting the whole child, expanding learning opportunities, and building capacity for educational partners. Equitable access, rigorous learning options, and recruiting and retaining a diverse and inclusive workforce are longstanding goals that gained new emphasis in the wake of the pandemic (Washington OSPI, 2023a).

For Washington, equitable access includes a strong emphasis on K–3 literacy and expanding universal pre-kindergarten to prepare all young children to transition into the K–12 system (Washington OSPI, 2022a). OSPI is also addressing opportunity gaps by ensuring that all students, particularly the most underserved, have the support they need to succeed. In addition, the state is enhancing CTE programs and integrating digital learning tools. The pandemic accelerated the adoption of technology in education; Washington is responding by integrating digital literacy and access into K–12 experiences.

Building a diverse and inclusive educational workforce and strengthening the capabilities of teachers, administrators, and educational institutions are priorities in Washington. This includes residency and high-quality professional learning for pre-service educators as well as

ongoing professional development, support for innovative teaching practices, and ensuring that all educators are equipped to meet diverse student needs (Washington OSPI, 2022b).

Specific legislative priorities have been set to support these initiatives, including securing funding for equity initiatives and special education, promoting mental health resources, and enhancing digital equity and inclusion (Washington OSPI, n.d.-c).

Washington Project 1. Supporting the Rollout and Implementation of New Learning Standards

R11CC will collaborate with OSPI to create supports for districts, Tribes, schools, and teachers to effectively implement new math and ELA learning standards as well as develop a codified approach and set of resources for standards implementation.

Background, High-Leverage Problem, and Identified Need

Education leaders at OSPI recently engaged in a comprehensive process to revise, refine, and align state learning standards in English language arts (ELA) and mathematics. As these standards are adopted, OSPI and its nine regional ESD partners will be responsible for providing teachers with critical professional learning about the new standards at every level of education across the state.

OSPI needs to develop and codify a predictable, replicable, and consistent process to support implementation of the revised ELA and mathematics standards.

Scope of Services and Intended Recipients

R11CC will collaborate with OSPI to develop a predictable, replicable, and consistent process to support standards implementation. Concurrently, we will build capacity to support future cycles of standards revision, alignment, and implementation. In year 1, we will provide a foundation for ESDs to facilitate and deliver professional learning about the new standards at a leadership level. We will also collaborate with OSPI to co-develop standards alignment mapping processes and TA tools and documents.

This project team will work alongside our project team supporting Montana OPI with standards implementation. While each project will align to the unique context of each state, a similar core process will guide both projects.

Intended recipients of TA include OSPI staff members, district administrators, school leaders, and teachers.

Alignment to Regional Center Requirements

- **Implementation of Washington’s Consolidated State Plan section pertaining to Title I, Part A,** particularly “Challenging State Academic Standards and Assessments” (Washington OSPI, 2017)
- Implementing, scaling up, and sustaining **evidence-based programs and practices** in literacy and math
- **Addressing the unique educational obstacles faced by underserved populations,** particularly the need for equitable and rigorous learning standards to accelerate academic improvements and learning loss recovery
- **Improving implementation of ESEA programs,** particularly Title I, Part A and Title II, Part A

Responsible Personnel

Jennifer Johnson and Jacob Williams (EDNW)

Key Partners

OSPI, nine regional ESDs, Association for Washington School Principals, Washington Association for School Administrators, Center for Strengthening the Teaching Profession. In addition, Montana OPI will serve as a thought partner given their similar project on learning standards (see project description in Montana state service plan above).

Milestones	Outputs
<p><i>(Year 1, Quarter 1)</i></p> <ul style="list-style-type: none"> Develop shared understanding of OSPI's philosophy, values, and beliefs for standards implementation 	<ul style="list-style-type: none"> Logic model and one-year action plan for participating pilot schools
<p><i>(Year 1, Quarters 1 and 2)</i></p> <ul style="list-style-type: none"> Conduct data review and identify criteria for possible pilot schools Develop readiness survey tool to guide implementation and identify pilot schools 	<ul style="list-style-type: none"> Summary report of data review Readiness survey and results List of participating pilot schools
<p><i>(Year 1, Quarters 1–3)</i></p> <ul style="list-style-type: none"> Identify and map differences between the revised standards and the previous version Develop practice profiles related to each standard, scope, and sequences, then synthesize them into a document Create a practical fidelity tool for standards implementation Develop communication and dissemination plan 	<ul style="list-style-type: none"> Document identifying the differences between the revised standards and the previous version Practice profiles Document outlining the essential functions for the standards in relation to a teacher's day-to-day work Fidelity tool for standards implementation Communication and dissemination plan in support of standards implementation
<p><i>(Year 1, Quarter 4)</i></p> <ul style="list-style-type: none"> Deliver training series to pilot participants Gather feedback from pilot participants and revise for broader implementation 	<ul style="list-style-type: none"> Draft facilitator and participant materials for professional learning series Draft implementation guidance document
<p><i>(Year 2, Quarter 1)</i></p> <ul style="list-style-type: none"> Develop plan for continuous improvement Develop materials outlining standards implementation process 	<ul style="list-style-type: none"> Finalized facilitator and participant materials for professional learning series, revised based on pilot feedback Plan for continuous improvement Documented predictable, replicable, and consistent process to support standards implementation

<p><i>(Year 2, Quarters 1–4)</i></p> <ul style="list-style-type: none"> • Implement evaluation activities • Based on findings from evaluation, develop continuous improvement plan for year 3 	<ul style="list-style-type: none"> • Evaluation report of standards implementation • Revised professional learning materials; implementation plan to achieve increased fidelity of implementation
<p><i>(Years 3–5)</i></p> <ul style="list-style-type: none"> • Design ongoing professional development for standards implementation • Implement standards implementation continuous improvement plan • Based on findings from evaluation, develop a revised continuous improvement plan for ongoing standards implementation 	<ul style="list-style-type: none"> • Evaluation report of standards implementation (annual) • Revised professional learning materials (annual) • Evaluation report of standards implementation • Revised continuous improvement plan for standards implementation • Revised professional learning materials; implementation plan to achieve increased fidelity of implementation

Outcomes

Short-Term

- 100 percent of the OSPI staff members involved in standards implementation report increased knowledge related to successfully implementing new programs/innovations
- 75 percent of schools identified as pilot schools indicate preparedness to implement the standards in the 2024–25 school year

Medium- and Long-Term

- 75 percent of Washington schools indicate preparedness to implement standards in the 2025–26 school year
- Data collected in evaluation activities demonstrate 80 percent fidelity for standards implementation

Dissemination

The Region 11 Supporting the Implementation of New Learning Standards project in Washington will disseminate guidance, tools, and materials that highlight best practices in math and ELA standards implementation at a variety of levels of the education system (e.g., schools, districts, ESDs, state) as well as impact stories about how the support influenced standards implementation and outcomes. Finally, R11CC will collaborate with OSPI and Montana OPI to disseminate a cross-state highlight, case study, tool, or resource for the field given their parallel work related to math and ELA standards reform. Materials will also be made available to the CC Network.

Washington Project 2. Support for Early Learning and Expansion of Transition to Kindergarten

R11CC will collaborate with OSPI to build capacity to scale the Transition to Kindergarten (TK) program.

Background, High-Leverage Problem, and Identified Need

In the 2023–24 school year, 53 percent of Washington students entering kindergarten demonstrated kindergarten readiness in the areas of social-emotional, physical, language, cognitive, literacy, and math as measured by the Washington Kindergarten Inventory of Developing Skills (WaKIDS; Washington OSPI, n.d.-d). OSPI has demonstrated that transition to kindergarten (TK) programs support student success in the early grades, especially for students with disabilities and students from low-income households (Washington OSPI, 2023b). However, as of January 2023, only 3,000 students enrolled in a TK program across the 101 Washington districts that offer such a program. For the 2023–24 school year, OSPI was legislatively mandated to implement a TK program. OSPI has until summer 2024 to establish permanent rules for the program.

As the permanent rules go into effect, *OSPI requires support to develop and implement a plan to scale the TK program by providing support to school districts.*

Scope of Services and Intended Recipients

R11CC will collaborate with OSPI and build capacity to scale the TK program. In quarter 1 of year 1, we will begin by ensuring that core OSPI staff members have a clear understanding of the essentials of the program. R11CC will facilitate collaborative sessions with OSPI to reach consensus on:

- Priorities for project effectiveness, specifically the impact of scaling the TK program
- The role of the OSPI once the TK program reaches scale

In quarters 2–4, we will complete a draft implementation action plan and associated support documents. Cooley and Kohl’s (2006) *Scaling Up—From Vision to Large-Scale Change* will guide development of the plan. The authors provide guidance for completing a detailed scaling-up action plan that includes three key steps and 10 tasks. R11CC will help OSPI draft an initial plan for implementation related to steps 1 (develop a scaling up plan) and 2 (establish the preconditions for scaling up). Step 3 (implementing the scaling up process) will proceed in years 2–3 of the project.

Intended recipients of TA include OSPI staff members and TK program leaders and educators.

Alignment to Regional Center Requirements

- Implementing, scaling up, and sustaining **evidence-based programs and practices** in early learning
- Addressing the **unique educational obstacles faced by underserved populations**, particularly students in early childhood

Responsible Personnel

Jennifer Johnson (EDNW) and Silvana Hackett (Child Trends)

Key Partners

OSPI; Washington State Department of Children, Youth, and Families; and Tribal early learning leaders

Milestones	Outputs
<p><i>(Year 1, Quarter 1)</i></p> <ul style="list-style-type: none"> • Support OSPI to determine priorities for effectiveness of the project • Support OSPI to explicitly define OSPI's role once the TK program reaches scale <p><i>(Year 1, Quarter 2)</i></p> <ul style="list-style-type: none"> • Guide OSPI to develop a vision for the TK program • Create a readiness assessment for OSPI and for schools across the state • Co-develop a TK scaling-up implementation plan <p><i>(Year 1, Quarter 3)</i></p> <ul style="list-style-type: none"> • Conduct readiness assessment for OSPI and schools • Co-develop a TK implementation guide for districts and schools • Develop fidelity of implementation monitoring tool • Develop a communication and dissemination plan to support startup • Co-design district and regional cohort support mechanisms <p><i>(Year 1, Quarter 4)</i></p> <ul style="list-style-type: none"> • Revise implementation plan, support materials, and communication plan in response to results of readiness assessment • Conduct statewide listening sessions to introduce and explain TK program • Finalize scaling-up plan for 2024–25 • Develop professional learning in support of TK program 	<p><i>(Year 1, Quarter 1)</i></p> <ul style="list-style-type: none"> • Document that details priorities and roles <p><i>(Year 1, Quarter 2)</i></p> <ul style="list-style-type: none"> • Implementation plan for scaling the TK program that includes a vision for the program; proposed actions for OSPI; timetables, roles, and responsibilities of OSPI staff and partners; and required resources • TK implementation readiness assessments for OSPI and schools <p><i>(Year 1, Quarter 3)</i></p> <ul style="list-style-type: none"> • Report with results and implications of the readiness assessments • TK implementation guide for districts and schools • TK program fidelity of implementation tool • Communication and dissemination plan and materials • Plan to develop and implement district and regional cohort support <p><i>(Year 1, Quarter 4)</i></p> <ul style="list-style-type: none"> • Report summarizing learning from statewide listening sessions • Finalized scaling-up implementation plan for 2024–25 school year • Professional learning sessions to support TK program implementation
<p><i>(Year 2, Quarter 1)</i></p> <ul style="list-style-type: none"> • Organize and facilitate a professional learning conference focused on TK program implementation • Facilitate district and regional cohort support • Design evaluation plan for TK program implementation <p><i>(Year 2, Quarter 2–3)</i></p> <ul style="list-style-type: none"> • Collect data in support of evaluation plan 	<p><i>(Year 2, Quarter 1)</i></p> <ul style="list-style-type: none"> • TK program professional learning conference • District and regional communities of practice and/or peer-to-peer exchange occurring within each ESD • TK program evaluation plan <p><i>(Year 2, Quarter 4)</i></p> <ul style="list-style-type: none"> • TK program evaluation report

<ul style="list-style-type: none"> Continued facilitation of regional cohort support <p>(Year 2, Quarter 4)</p> <ul style="list-style-type: none"> Analyze evaluation data and produce report Revise professional learning plans and materials in response to evaluation results Revise scaling-up plan to work toward sustainability 	<ul style="list-style-type: none"> Revised professional learning plan and materials (annual) Revised scaling-up plan (annual)
<p>(Years 3–5)</p> <ul style="list-style-type: none"> Revise evaluation plan Continue to provide professional learning to TK program implementers Collect data in support of evaluation plan Continue to facilitate regional cohort support Analyze evaluation data and produce report Revise professional learning plans and materials in response to evaluation results Revise scaling-up plan to work toward sustainability 	<p>(Years 3–5)</p> <ul style="list-style-type: none"> TK program professional learning sessions District and regional communities of practice and/or peer-to-peer exchange occurring within each ESD TK program evaluation plan and report Revised professional learning plan and materials (annual) Revised scaling-up plan (annual)

Outcomes

Short-Term

- 50 percent increase in the number of Washington schools offering TK programs
- 100 percent of the OSPI core staff members involved in TK program report an increased understanding of how to effectively scale programs
- 75 percent of staff members who participate in TK program professional learning indicate preparedness to implement TK in the 2025–26 school year

Medium- and Long-Term

- Funding for the TK program is codified in legislation
- 75 percent of students entering kindergarten demonstrate readiness as measured by the WaKIDS
- 80 percent of Washington schools offer a TK program
- 85 percent of Washington students demonstrate proficiency on grade 3 literacy and math assessments

Dissemination

The Region 11 Support for Early Learning and Expansion of Transition to Kindergarten (TK) project in Washington will disseminate tools and resources focused on TK program scaling strategies as well as testimonials and reports from program administrators and staff members about TK programs and the impact of professional learning on implementation and scaling of programs. Materials will also be made available to the CC Network.

One additional project idea emerged in our conversations with OSPI and through our review and understanding of Washington's needs and priorities that we may pursue as additional or future work:

Support continued development of high-quality teacher residency programs and identify strategies for improving educator preparation. Washington recently supported the development of the first union-led teacher residency program and provided support and resources over the past two legislative sessions to design and implement additional residencies at educator preparation programs around the state.¹² Through this project, R11CC will collaborate with OSPI and other partners in the state to identify and share evidence-based practices related to teacher preparation; facilitate learnings and best practices between teacher residency programs and traditional teacher preparation programs; collaborate with REL Northwest to support the collection, analysis, and reporting out of data for continuous improvement related to program development and implementation; and connect providers, program leaders, and other local partners to SMEs, researchers, policymakers, and other programs in the field.

B. QUALITY OF PROJECT DESIGN

To implement, sustain, and scale the projects proposed in Section A, we offer a project design that reflects the best of old and new: We incorporate lessons learned from decades managing CCs and REL Northwest to withstand abrupt political, personnel, and priority shifts, as well as innovative approaches to deliver intensive services and engage in feedback loops with clients in the post-COVID era.

¹² <https://www.washingtonea.org/events-training/residency/>

MANAGEMENT STRUCTURE

Our management structure clearly delineates roles and responsibilities—the first step to effective performance management. From managing CCs and REL Northwest, EDNW has learned the importance of combining an experienced, diverse leadership team with a set of project leads, staff members, operating partners, and SMEs that can rotate as project needs change. The proposed team can bring

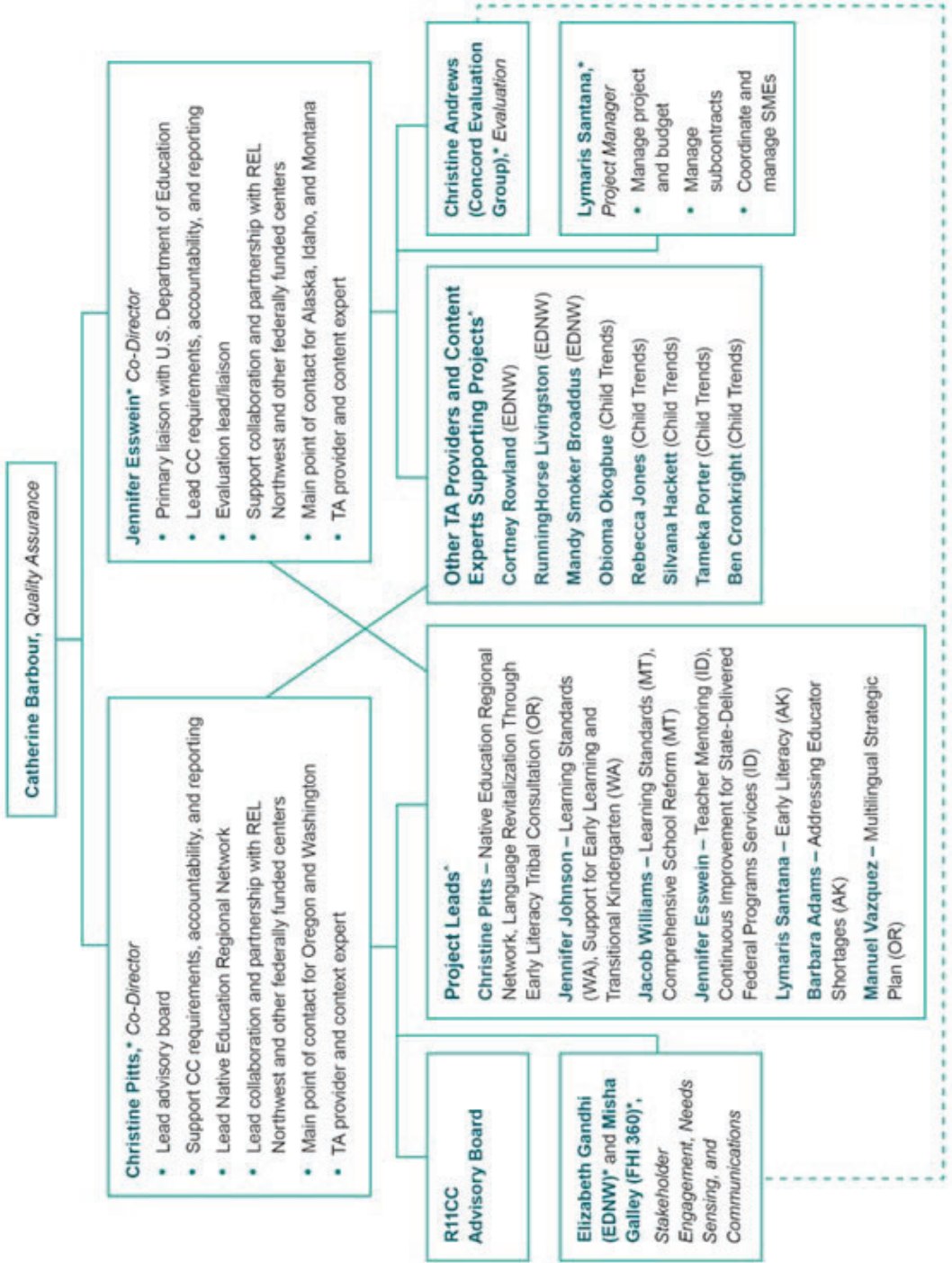
The R17CC team was a tremendous help to support our team with internal item review for our through-year assessment. They join us for weekly team meetings with our testing vendor and help us prepare for these meetings. They provide high-level support and insight for our team that no one in our agency is able to provide.”

– Montana OPI, 2023

all inputs outlined in the logic model and execute on the TA approach to meet intended outcomes. The organizational chart (figure 4) represents an efficient approach to managing all components of the project, including performance, evaluation, stakeholder engagement, and personnel. Each role in the organizational chart is described in further detail in appendix B.¹³

¹³ Individual staff qualifications can be found in section C1.

Figure 4. R11CC Organizational Chart



*Part of the R11CC Leadership Team. Bios can be found in section C1 and resumes appear in Key Project Personnel Attachment

B1. PERFORMANCE MANAGEMENT AND EVALUATION PLAN

Embedding continuous improvement practices will result in a responsive, outcomes-based, and scalable project. In line with the “Collaboratively Engage in Continuous Improvement and Feedback Cycles” phase of our TA approach, our performance management and evaluation plan ensures that R11CC continuously and systematically processes feedback on our progress toward building capacity and achieving expected outcomes (Brown & Kiernan, 2001). CCs have the challenge of simultaneously implementing continuous improvement at the project and systems level, minimizing redundancies in data collection while informing implementation, and answering questions about outcomes. In our experience, an exceptional approach to embedding continuous improvement includes five key features:

1. A **common language** for continuous improvement to support a culture of feedback
2. An **internal evaluator** collecting formative data aligned with stakeholder engagement **paired with an external evaluator** reporting on performance and outcomes
3. **Clear goals and measures** related to reach, use, and impact in the short, medium, and long term at the systems and project levels
4. **Data collection and analysis** that minimize client burden and provide formative and summative data including **opportunities for feedback loops**
5. **Management systems and tools** to support these activities

Common Language for Continuous Improvement

Continuous improvement is foundational to our performance management and evaluation system. Our team routinely reviews and integrates feedback from clients and recipients, operating partners, and other external partners, as well as insights from regular team meetings. We collect lessons learned and capture them for future project planning. We have refined the necessary systems for implementing CC activities and developed effective strategies for identifying and mitigating risks, as articulated throughout this section.

We use a continuous improvement discussion guide to create a common language across internal and external teams. The 2016 Institute for Healthcare Improvement guide offers an ideal approach for norming around setting priorities, solving problems, adapting, and reflecting (table

6). We use this simple, common-sense guide throughout our work—from planning and pulse checks with state chiefs to individual project design and ongoing implementation.

Table 6. Continuous Improvement Discussion Guide

Guiding Question	Description
<i>What problem are we trying to solve?</i>	<ul style="list-style-type: none"> • Is this aligned with our initial high-leverage problem? • Is this problem still relevant, and is it evolving? • Do our capacity-building efforts still align to the problem and identified needs? • Are we creating new problems, or are there other residual effects we should consider?
<i>What changes might we introduce and why?</i>	<p>In our annual service plan we identify the capacity-building actions we believe will impact the high-leverage problem. During our continuous improvement process, we assess stated milestones to determine:</p> <ul style="list-style-type: none"> • Are the actions occurring as planned? • Are clients expressing satisfaction with the capacity-building support, and have they shared new needs? • Are we meeting the needs of the most disadvantaged populations? • Are all voices being heard? • Are there unanticipated barriers, and do we need to adjust to overcome them?
<i>How will we know if a change is an improvement?</i>	<p>Monthly reporting allows us to track progress toward annual service plan established outcomes. During continuous improvement, we monitor progress to outcomes through monthly reporting as well as our internal and external evaluation process. Outcomes may be distant from specific points of implementation, and this question helps us focus on reaching and measuring outcomes.</p> <ul style="list-style-type: none"> • How are we progressing through milestones, outputs, and client satisfaction? • What are our formative data collection indicators telling us about our progress? • What additional data will inform whether or not something is working?

Source: Institute for Healthcare Improvement (2016).

Internal and External Evaluation Approach

In our experience managing CCs, we have found it valuable to build an evaluation team comprising an internal evaluator from EDNW’s research and evaluation group (who does not participate in the TA) and an external evaluator. The internal evaluator sits on the stakeholder engagement and evaluation teams to ensure efficient data collection and use across teams. For

example, the internal evaluator will coordinate across internal teams and the REL on annual needs sensing to inform service plans. The external evaluator brings an independent, objective lens and offers credibility in the field when collecting data. The internal and external evaluators will independently collect and analyze some data and jointly analyze other data. They will meet regularly to discuss planning, progress, and challenges. The team will also co-author any reports for stakeholders or the U.S. Department of Education, with the external evaluator responsible for final drafts. Our proposed internal/external evaluation team is experienced in this capacity from serving as current co-evaluators for Region 17 CC.

Clear Goals and Measures

In this section, we describe the Center- and project-specific measures and outcomes that our performance management and evaluation plan will focus on as well as the methods our evaluation team will use to collect data and monitor progress toward outcomes, outputs, and milestones, including the reach, use, and impact of R11CC's services and products.

Like our evaluation for Region 17 CC, defined program performance measures for R11CC will include the four federal performance measures (identified in the NIA as required of all Regional Centers) and supplemental program-specific measures. Appendix C contains the full list of defined program performance measures. Many measures derive from the list developed by the national Evaluation Working Group in the current CC funding cycle.¹⁴ Additional measures were developed specifically for R11CC based on our logic model—these measures supplement the federal performance measures and enable us to track progress on outcomes that are specific to R11CC and its projects and were not directly captured by the federal ones.

¹⁴ The Working Group, comprising staff members and evaluators from the Regional Centers, was established by the Department of Education during the current funding cycle to recommend indicators, instruments, survey items, and performance targets for the four GPRA performance measures. While we know these as the four GPRA measures from our Region 17 CC experience, we use language consistent with the NIA for the purposes of the proposal: <https://www.govinfo.gov/content/pkg/FR-2024-05-13/pdf/2024-09876.pdf>

We understand from the NIA and from our Region 17 CC work that the **four federal performance measures** used to evaluate the effectiveness of each CC are:

1. Clients are satisfied with the quality, usefulness, and relevance of services provided (PM 1).
2. The Center provides services and products to a wide range of recipients (PM 2).
3. The Center demonstrates that capacity-building services were implemented as intended (PM 3).
4. The Center demonstrates that recipient outcomes were met (PM 4).

These performance measures align directly with the **short-, medium-, and long-term outcomes identified in our logic model**, particularly PMs 3 and 4 focused on capacity-building services and recipient outcomes. The performance measures and logic model outcomes facilitate formative and summative data collection, analysis, and reporting, allowing R11CC to focus on continuous improvement and understand long-term impact and effectiveness. The performance measures and logic model outcomes also allow us to measure the four dimensions of capacity over time: human, organizational, policy, and resource. Table 7 maps the four federal performance measures to proposed R11CC logic model outcomes.

Table 7. Region 11 Logic Model Outcomes Aligned with Performance Measures

Short-Term Outcomes	Medium-Term Outcomes	Long-Term Outcomes
Clients and recipients (including SEAs and LEAs) ...		
Report a strong sense of engagement with R11CC that contributes to buy-in, continuous improvement, and project sustainability (PM 1)	Provide high-quality, culturally responsive services and supports (PM 3)	Select, implement, improve, scale, and sustain evidence-based, culturally responsive programs, practices, and interventions (PMs 3, 4)
Demonstrate new/increased knowledge of high-leverage problems and evidence-based, culturally responsive strategies to address them (PM 4)	Refine policies, practices, programs, and systems to improve educator and student outcomes (PM 4)	Effectively implement and monitor ESEA programs (PMs 3, 4)
Create structures and systems that are evidence based, comply with federal/state priorities and	Cultivate relationships to support implementation (PM 1)	Improve and document systems change for sustainability and scalability (PM 4)

Short-Term Outcomes	Medium-Term Outcomes	Long-Term Outcomes
Clients and recipients (including SEAs and LEAs) ...		
policies, and respond to local needs (PM 3)		
Effectively communicate, implement, and disseminate services, tools, and products to engage target recipients and build awareness of the CC (PM 2)	Institute practices and programs to sustain evidence-based, culturally responsive strategies beyond the grant cycle (PM 3)	Use a two-way system of communication and disseminate services, tools, and products to engage target recipients (PM 2)
Plan and implement evidence-based, culturally responsive practices for equity and school improvement (PM 3)	Effectively communicate, implement, and disseminate services, tools, and products to engage target recipients and advance awareness of the CC (PM 2)	Consistently recruit, support, and retain high-quality educators to benefit underserved and high-need schools and students (PMs 3, 4)
	Design approaches to enhance learning for underserved and high-need student populations (PMs 3, 4)	Improve opportunities, outcomes, and equity for underserved and high-need students (PMs 3, 4)
	Improve school improvement planning processes (PMs 3, 4)	
	Advance evidence-based, culturally responsive strategies in LEAs and schools (PMs 3, 4)	

Project-Specific Performance Measures and Logic Models. To understand and measure the outcomes in our logic model, we must develop project-specific logic models and performance measures. Project leads and SEA clients will co-develop project logic models that align with R11CC logic model outcomes and identify project-specific performance measures. The evaluation team will meet with each project team to understand how they plan to measure project-specific outcomes, then add custom questions to data collection instruments only for clients and recipients of those specific projects. These data will supplement other data being collected to capture a holistic picture of progress toward outcomes. Progress on the measures will be captured through various data sources articulated below.

Evaluation Map. We will immediately create an evaluation map to examine R11CC's capacity-building approach and intended outcomes, outputs, and milestones. This evaluation map will be used to develop instruments used to track the Center's progress (and in some cases, repurpose existing instruments). Below is an example evaluation map developed for the evaluation of Region 17 CC (exhibit 1). The evaluation map includes overarching performance measures, submeasures to state each measure of success that will be tracked, indicators (how we know if success has been achieved), measure types (federal or program-specific), data sources, item numbers of data collection instruments (if relevant), timing of data collection, who collects it, and performance targets. For example, in exhibit 1, for the first measure we will know the Center is successful if at least 85 percent of stakeholders rate the TA services as high quality. We will create a similar map for R11CC and update it continuously.

Exhibit 1. Evaluation Map for Region 17 CC, Operated by EDNW

Objective 1 (GPRA 1): Region 17 clients are satisfied with the quality, usefulness, and relevance of services provided.								
Performance Measure	Indicator	Measure Type	Data Source(s)	Items	Timing	Collected by External or Internal Evaluator?	Target Ratio	Target %
1a. Region 17 technical assistance (TA) services are considered high quality by its stakeholders, as indicated by the percentage of stakeholders who rate the TA services as high quality.	85% of stakeholders will rate the TA services as high quality	GPRA	SEA/LEA Survey	3	Semi-annual	External	8.5/10	85%
1b. Region 17 TA services are considered useful by its stakeholders, as indicated by the percentage of stakeholders who rate the TA services as useful.	85% of stakeholders will rate the TA services as useful	GPRA	SEA/LEA Survey	4	Semi-annual	External	8.5/10	85%
1c. Region 17 TA services are considered relevant by its stakeholders, as indicated by the percentage of stakeholders who rate the TA services as relevant.	85% of stakeholders will rate the TA services as relevant	GPRA	SEA/LEA Survey	5	Semi-annual	External	8.5/10	85%
1d. Percent of TA recipients reporting satisfaction with the quality of the services provided.	85% of stakeholders will rate the TA services as high quality	Project	Participant Survey	3	Annual	External	85/100	85%
			Event Survey	second bank of questions	Ongoing	Internal	85/100	85%
1e. Percent of TA recipients reporting satisfaction with the usefulness of the services provided.	85% of stakeholders will rate the TA services as useful	Project	Participant Survey	4	Annual	External	85/100	85%
			Event Survey	second bank of questions	Ongoing	Internal	85/100	85%
1f. Percent of TA recipients reporting satisfaction with the relevance of the services provided.	85% of stakeholders will rate the TA services as relevant	Project	Participant Survey	5	Annual	External	85/100	85%
			Event Survey	second bank of questions	Ongoing	Internal	85/100	85%

All performance measures, our evaluation map, and our overall evaluation approach will help determine the extent to which capacity-building services proposed in annual service plans were implemented as intended; recipient outcomes were met (short-, medium-, and long-term);

recipient capacity was developed; and services reached and were used by intended recipients.

These data will also be available for the National Evaluation of the Comprehensive Center

System in which our team will participate.

Data Collection, Analysis, and Sharing Efforts

The performance management and evaluation team will use the following mixed-methods sources to gather formative and summative quantitative and qualitative data to inform the performance measures (table 8). Evaluation data will be used for continuous improvement and monitoring progress toward outcomes.

Table 8. R11CC Evaluation Data Collection Sources and Activities*

Data Collection Tool	From Whom?	When?	Analyzed by?
Capacity-building planning tool	Project leads will collect data during initial planning meetings with SEA clients and report the data using the internal monthly progress report	Project start	External evaluator
Capacity-building assessment tool	Project leads and the internal evaluator will collect data during annual meetings with SEA clients and report the data using the internal monthly progress report	Annually	External evaluator
Monthly progress report (PMs 2–4)	R11CC project leads, communications staff members, and evaluators	Monthly	External and internal evaluator
Client surveys^a (PMs 1–4)	Key SEA/LEA staff members (1–2 people per state)	Semi-annual	External evaluator
Recipient surveys (PMs 1–4)	SEA/LEA staff members and other clients and recipients of TA services who are not key staff members	Semi-annual	External evaluator
Services and products feedback survey (PMs 1–4)	All clients and recipients who receive services or products offered by R11CC, differentiated by tier of service	After delivery of services and products	Internal evaluator
Artifacts and existing data (PMs 3 and 4)	Project leads will collaborate with clients and recipients to develop their own capacity to collect evaluation data and to share those data with the evaluation team	Ongoing	External and internal evaluator
Website analytics (PMs 3 and 4)	R11CC communications staff members	Ongoing	Internal evaluator

Data Collection Tool	From Whom?	When?	Analyzed by?
Project-specific measures (PMs 3 and 4)	Staff members and clients and recipients, possibly educators and students	Ongoing	External evaluator
On-site observations and interviews/ focus groups (PMs 1–4)	When appropriate and feasible, the evaluation team will conduct on-site observations and interviews or focus groups with participants in project activities	As needed	External and internal evaluator

* Several data collection sources and activities will also be used for stakeholder engagement and needs sensing. More information about this component can be found in section B2.

^a See appendix D for example survey instrument.

Below, we highlight an innovative data collection approach we plan to use that was previously developed by EDNW: the capacity-building planning and assessment tools.¹⁵ When a project begins, the project lead will meet with the SEA client for an initial planning meeting. The lead will use the **capacity-building planning tool** (see appendix E) to collect data to assess change over time in four capacity-building areas: human, organizational, policy, and resource. The planning tool offers a baseline measure of SEA capacity relevant to the project and goals for progress. Leads will enter the data in the monthly progress report for analysis by the external evaluator. The lead will also use the data to drive TA.

At least annually, the lead will meet with the SEA client to assess progress using a **capacity-building assessment tool**. The internal evaluator will attend this meeting to provide an independent assessment of progress. Later, the internal evaluator and the lead will meet to discuss what they learned and arrive at consensus about progress. The lead will enter results in the monthly progress report for analysis by the external evaluator. Leads will also use the data to iterate on plans for TA. Data from the planning and assessment tools will be formative and

¹⁵ Descriptions of the remaining data collection sources in table 8 can be found in appendix F.

summative—used to inform continuous improvement and to assess change in the four areas of capacity over time (progress on PMs 3 and 4).

EDNW developed these tools for our Region 17 CC work. They support our capacity-building process—and our clients’ understanding of the process. They also allow us to collect data about how to improve our efforts. Region 17 CC staff members participated in a working group facilitated by the U.S. Department of Education on best practices around collecting data to understand capacity building. Learnings from the working group informed the tool.

Feedback Loops Built into the Performance Management and Evaluation Plan

At the start of each project, R11CC project leads will meet with clients to assess needs and establish a baseline for project indicators and measures. Project leads will report monthly on project progress; data will be fed back to clients to change course, if needed. Additionally, data collected after the delivery of services and products will be provided to TA staff members to facilitate reflection on the quality, relevance, and usefulness of ongoing TA. Formative reports summarizing the results of annual capacity-building assessment tool discussions between project leads and clients will be shared with clients as part of the continuous improvement cycle. The evaluation team will also participate in regular (quarterly) project planning meetings with R11CC staff members and convene an annual evaluation meeting with the R11CC staff to allow for structured reflection on the work to date (including implementation of capacity-building services) and progress toward milestones, outcomes, and performance measures. The evaluation team will collect feedback on the usefulness of data and regularly reflect on any challenges with data collection. The team will review feedback on evaluation utilization and seek feedback from the R11CC staff about ways to enhance evaluation data use to support the Center’s mission (Smith, 1988).

Data Analysis and Quality Control

Quantitative analyses will be used to present and interpret numerical data. They will be largely descriptive, including summarizing the numerical data collected (e.g., sample sizes; frequency tables; measures of central tendency, such as averages; measures of variability, or standard deviations). Qualitative data will be analyzed thematically, and relevant quotes will supplement quantitative findings and provide rich contextual support to the quantitative data (Cassell & Bishop, 2019). We will also collect website analytics. Whenever there are spikes or drops in website visits, the internal evaluator will attempt to determine why by examining the analytics in relation to product releases, events, time of year, and any other relevant factors. Both internal and external evaluators will conduct data quality checks by verifying the accuracy and reliability of the data collected, entered, and coded. We will record all interviews and compare recordings to written notes. We will develop coding schemes and compare the coding of the transcripts to coding schemes to ensure that codes were accurately applied.

Sharing Evaluation Findings with Clients, Recipients, and the Community

The evaluation will track all defined program performance measures over time and report the data each year in the annual evaluation report and 524B report. Annual reports will provide summative data for tracking progress. The annual evaluation report will include an executive summary of findings, areas for improvement, and recommendations for future work that will then be shared with clients (see appendix G for a sample report from Region 17 CC). We will also create a version of the annual evaluation report to disseminate to clients, recipients, and the wider community. We will make the report available online annually and provide an accessible way for community members to respond or provide feedback on the report and our work.

Performance Management Tools and Systems

Technology

EDNW uses technology including Smartsheet and Microsoft Teams to coordinate tasks and measures across states and more than 100 active projects. We host online meetings and webinars via Teams and Zoom, and our office has two Zoom rooms with multiple screens and cameras for hybrid meetings. These tools help us schedule and supervise personnel, manage subcontractors, deliver high-quality services on time and within budget, report consistently on project status and outcomes, and ensure effective and timely business practices.

To monitor R11CC outcomes, outputs, and milestones, all project leads will complete monthly reports in Smartsheet, a web-based platform that can be accessed anywhere, from any device, and has controlled access. This allows all necessary information to be entered and viewed by relevant parties. Monthly reports directly align to variables in each state's annual plan, which include, but are not limited to: milestones, outputs, and/or outcomes achieved in the prior month; milestones, outputs, and outcomes anticipated to be achieved in the upcoming month; project activities that occurred in the prior month; project activities planned/anticipated for the upcoming month; resources shared with SEAs and other relevant partners; participation in conferences or other professional learning to support an identified SEA need or disseminate R11CC learnings; and names, roles, and affiliations of all partners R11CC engaged in prior month activities.

The completed monthly reports allow us to stay accountable for our work scope, update the U.S. Department of Education program officer on progress, and highlight accomplishments and challenges. The monthly reports feed into a spreadsheet that R11CC directors and internal and external evaluators can access. The data will inform continuous improvement and our annual evaluation report and assessment of progress.

Meetings

Meetings are necessary for efficient communication and problem solving as well as providing time for project teams to focus on continuous improvement. However, unstructured meetings waste time and resources. EDNW has established organizational meeting norms to keep meetings efficient, effective, and productive. Our norms include:

- **Meeting preparation** by hosts and participants to ensure everyone has the information, resources, and technology to participate fully and that each meeting has purpose.
- **Standing agendas** posted in Teams one day in advance of meetings. Agendas include a topic, purpose, decision points, and action items.
- **Automated notetaking through Zoom.** Project leads (or designated staff members) review and post AI meeting summaries within one day after the meeting.
- **Verbalized and documented summaries, takeaways, and next steps** so teams and meeting participants know what the action items are and who is responsible.

Table 9 lists the types of meetings we expect to host for R11CC, as well as anticipated meeting participants, frequency, and purpose.

Table 9. Performance Management Meeting Schedule

Meeting	Participants	Frequency	Purpose
Center Management Meetings	D, PM, others as needed	Monthly	Overall project monitoring (relationships, project status, staffing, budget, risks)
Data and Evaluation Meetings	D, PM, EL, CL as needed	Monthly	Monitor needs sensing and other data collection, review synthesis of monthly reporting, review broader data collection biannually, support national evaluation
State Team Meetings	D, PM, EL, CL, others as needed	Monthly	Share updates on state context, partnerships, and policy; coordinate activities and projects; identify opportunities to leverage resources and continuously improve support
Project Update Meetings	All team by project	Every other month	Discuss evolving priorities and needs, project status, and strategies for integrating activities and

Meeting	Participants	Frequency	Purpose
			approaches across projects and states; determine next steps; reflect on progress; identify areas for improvement
Project Review Meetings	D, PM, quality assurance lead, finance admin	Bi-monthly	Review quality, timeliness, budget, and client and recipient partner satisfaction; assess risk; identify focus for continuous improvement
Annual Planning and Reflection Meeting	D, PM, PL, and key client and recipient and other partners	Annually	Review client feedback, needs-sensing data, lessons learned, outcomes achieved, and course corrections needed; develop service plans for the upcoming year

D = directors. PM = project manager. PL = project leads. CL= communications lead. EL = evaluation lead.

Quality Assurance and Risk Management

EDNW's quality assurance procedures are based on the highest standards of technical excellence, professionalism, and relevance to our clients and recipients. For example, each project deliverable is assigned a quality reviewer with relevant expertise, and each major project is reviewed every other month for quality, timeliness, and budget. Depending on the scope and scale of the deliverable, SMEs may also be brought in to review specific deliverables.

B2. STAKEHOLDER ENGAGEMENT SYSTEM

EDNW and our operating partners have honed our approach to stakeholder engagement in this region to collect and share the right data for all phases of work and to ensure frequent feedback loops to gather immediate feedback and needs from clients and recipients. By aligning our engagement and evaluation efforts, we minimize the burden on clients and recipients and collect data that meets a variety of project needs. Since the pandemic, we have found that clients and recipients are more comfortable than ever using technology to provide feedback. For this reason, our plan incorporates technology such as LinkedIn communities, text surveys, and social media to increase multi-way engagement. FHI 360, who will co-lead this component of the work with EDNW, brings extensive experience developing and managing engagement and outreach

strategies that improve uptake of effective practices and strengthen educational outcomes. For example, in 2022, FHI 360 launched the *Connected & Engaged: Nurturing Instructional Leadership* site to provide instructional leaders with evidence-based strategies and resources to create supportive, engaging environments for their students.¹⁶ The site includes guides for family collaboration, as well as teaching and learning in post-pandemic and remote environments.

A System that Results in a High Level of Engagement

To be effective, Regional Centers and SEAs require productive relationships with diverse stakeholders. R11CC's stakeholder engagement system will actively involve clients and recipients as well other relevant groups at all levels (federal, state, local) across project phases: needs sensing, co-design, shared decision-making, dissemination, and reflection on relevance and usefulness. EDNW brings regionally specific expertise in this area: We regularly conduct culturally responsive engagement with educators, students, families, and communities across the Northwest. For example, while co-developing ODE's multilingual learner strategic plan, EDNW conducted over 60 community engagement events with over 400 participants across Oregon.

Our stakeholder engagement system will use multiple vehicles (described below) to improve the reach, relevance, and efficacy of R11CC services, thereby increasing overall impact. Our system has two strategic objectives:

- 1. Build a foundation for effective engagement** by identifying key stakeholders and understanding and documenting their strengths, needs, and existing relationships. Our team can immediately make progress on this objective given our in-depth understanding of local and state contexts and existing relationships, partnerships, and networks.

¹⁶ <https://connectedandengaged.fhi360.org/>

2. Develop, launch, and strengthen a fluid, multi-way stakeholder engagement system

to share information, receive feedback, and measure engagement effectiveness and reach.

Below we describe how we will address each of these objectives.

Foundational Components of Stakeholder Engagement

Our deep experience in the region lays a solid foundation for stakeholder engagement.

From operating REL Northwest, CCs, and other projects, we start with an existing network of organizations and individuals to engage. We will refine this initial list by:

- **Conducting project-specific stakeholder planning (twice per year).** As service plans are developed and implemented, an engagement team member will work with project teams to identify relevant stakeholders and key inflection points for outreach. They will also share how annual needs-sensing data, collected in alignment with the REL, can inform project work. Project-specific stakeholder planning conversations will take place during existing project-update meetings discussed in the performance management section.
- **Engaging the R11CC Advisory Board to inform stakeholder engagement efforts (twice per year).** We will work with the advisory board during its regular meetings to identify, build, and strengthen networks where targeted audiences are most likely to seek or receive information. This will ensure that we expand the CC's reach to the largest number of recipients possible and that our services are relevant and useful. The advisory board will help us build broad and deep awareness of R11CC offerings and provide input on stakeholder engagement, including the needs of priority and hard-to-reach audiences.
- **Conducting listening sessions with Center stakeholders (annually).** Current knowledge, the advisory board, clients, and other partners will inform selection of participants for an initial set of listening sessions. We will use the sessions to strengthen our current understanding of stakeholder priorities and gather feedback on plans for R11CC projects as

well as implementation, improvement, and scale-up. We will collect information about preferred communications channels, vet outreach and dissemination ideas, and establish communication processes for the CC and SEAs to continue to engage stakeholders. In our experience, these sessions often provide an added benefit of learning about other aligned initiatives and potential recipients for implementation and scale-up. In subsequent years of the CC, engagement team members will host stakeholder gatherings including the foci above as well as time for Q&A and feedback on projects.

Strengthening the Stakeholder Engagement System

Through the vehicles below, we will more fluidly engage state, regional, Tribal, and local stakeholders—including educators, students, and parents—in frequent communication that complements the methods above and offers additional multi-way communication with clients and recipients, the broader CC Network, and the Department of Education. These activities will support needs sensing and stakeholder engagement while aligning with and supporting our performance management and evaluation plan, including data collection needs.

- **Create and manage online communities.** We will collect contact information to build online communities (e.g., on LinkedIn) where we can gather feedback on ongoing and planned services, share activity and product information, and create space for shared learning around specific themes and activities. The communities will allow for immediate outreach and feedback with specific, targeted groups and curated exchanges between members. EDNW recently used this strategy to engage over 730 staff members from higher education institutions across the country in a LinkedIn learning community on supporting students' basic needs to improve their academic outcomes.
- **Develop and implement “push text” input and feedback forms.** In coordination with the performance management and evaluation plan, we will create a brief template (i.e., services

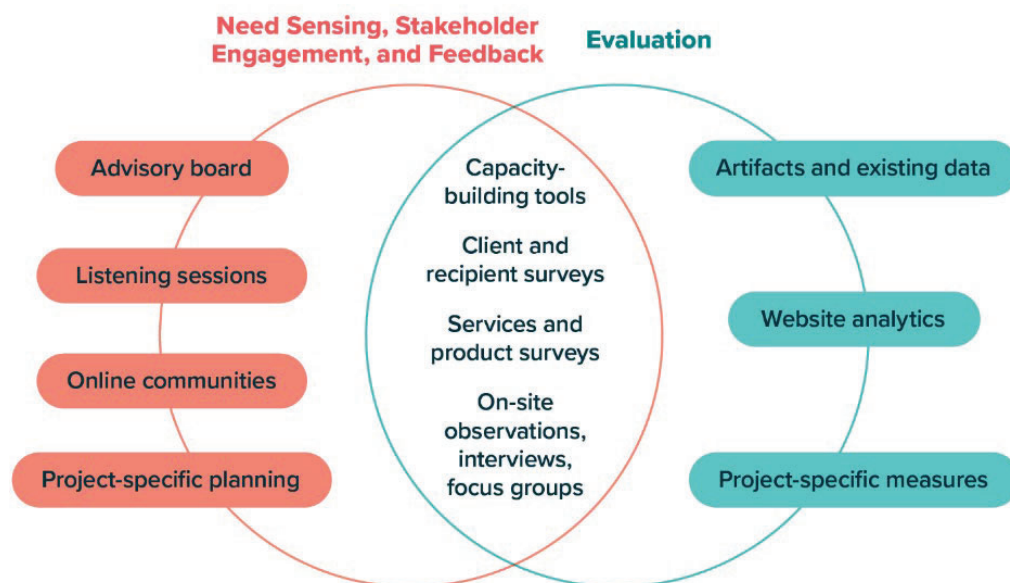
and products feedback survey) that can be customized for different projects or audiences (e.g., rural communities, districts with a high proportion of newcomer students) to collect honest, clear feedback from users. This will allow us to understand how products and services of the SEA and R11CC are used, fidelity of use, and ways to improve.

Finally, we will use tools from the evaluation plan, including the capacity-building planning and assessment tools, client and recipient surveys, and site visits, to gather additional input, as needed.

Leveraging Stakeholders for Continuous Improvement

A key component of our stakeholder engagement system is frequent feedback loops that collect immediate feedback and needs from clients and participants. We aligned our stakeholder engagement and evaluation systems to ensure we meet the needs of our stakeholders, provide opportunities for meaningful input and feedback regarding our support of their respective SEA, and inform our constant efforts for continuous improvement. Figure 5 demonstrates how the two systems work collaboratively in support of these outcomes.

Figure 5. Alignment of Data Collection Sources



Sources on the left will be used for needs sensing, engagement, and feedback. Some of these activities will be done jointly with the REL annually. Sources in the middle will be aligned and utilized for needs sensing, feedback, and project and center evaluation, whereas sources on the right will be used for evaluation.

Additionally, as part of the broader continuous improvement process, we will measure the effectiveness of our stakeholder engagement system by reviewing the data collected on reach and use of information and identifying areas for improvement. We will review data from feedback forms, advisory board inputs, and performance measure reporting to understand the effectiveness of our efforts, identify gaps or challenges, and explore solutions in biannual data and evaluation meetings as well as annual reflection and planning meetings.

Finally, as outlined in section B4, within the first three months of award and regularly thereafter, we will meet with REL Northwest to learn about their current projects, relationships, partnerships, and needs-sensing and stakeholder engagement strategies (given that their contract is already underway) to identify areas for coordination, efficiencies, and role clarification.

ENSURING EFFECTIVE AND EFFICIENT COMMUNICATION AND DISSEMINATION

While Regional Centers primarily focus on intensive TA, communication and dissemination are critical for informing clients, recipients, and other partners about our work. To reach the right audiences, we must communicate information that is relevant as well as accessible, including through the Comprehensive Center Network. Both EDNW and FHI 360 have extensive experience creating and implementing innovative and effective communications approaches that reach wide audiences. For example, in 2023, EDNW's communications team wrote and designed an impact story on the Montana Teacher Residency Demonstration Project. Later that year, our story was one of only three nationwide that the Best Practices Clearinghouse

chose to highlight in a spotlight video.¹⁷ Using clear, impactful storytelling, we helped Montana promote its successful, evidence-based approach to a pressing education challenge. (See section C2 for more on the Montana Teacher Residency Demonstration Project.) The full R11CC communications plan, including details on audience (e.g., state- or population-specific), vehicles (e.g., newsletters, web, social media, other centers), and measures, can be found in appendix H.

B3. PERSONNEL MANAGEMENT SYSTEM

In our experience, personnel management is one of the most critical elements of successful Regional Centers. Regional Centers need staff members who can build credibility with SEA teams and manage longer-term sustained projects, often embedded within the state education ecosystem. Regional Centers also need on-call access to vetted SMEs who can quickly understand project context and their role in project design, implementation, and measurement. Without trusted, credible staff members, Regional Centers can be relegated to lower-level state projects with limited potential for outcomes. Without flexible staffing, Regional Centers can become focused on the expertise of the assigned individuals, rather than project needs. Below, we describe EDNW's comprehensive personnel management system, which is designed to mitigate risks through:

- **Appropriate and sufficient staffing allocations** to bring the right resources to the field when they are needed
- **A tested process for vetting, hiring, staffing, and onboarding** to ensure staff members and SMEs are properly prepared and staffing levels are sufficient to meet project needs
- **A comprehensive and growing SME pool** along with a process for vetting, recruiting, and assessing performance

¹⁷ https://bestpracticesclearinghouse.ed.gov/video/montana_teacher_residency_demonstration_project.html

- **A learning culture** that results in staff development and retention
- **Regular feedback loops**, including client input for staff fit, development, and performance
- **Efficient and tested partner management processes**, allowing staff members to work seamlessly as one team

Appropriate and Sufficient Staffing¹⁸

Our personnel management system is based on our years of experience working with state, regional, local, and Tribal education agencies as well as schools. For example, we know that SEA leaders who engage with CCs prefer to have a single senior-level point of contact. As such, we are proposing a co-director model, with each .58 FTE EDNW co-director conducting internal and external project strategy, implementation, and overall management; serving as a liaison for key state leaders; overseeing project work in those states; and providing assurance of overall quality and client/partner satisfaction. The additional FTE above the required will allow the co-directors to also conduct project work. This structure will allow us to deliver more resources to states at the project level, bringing the best experts available to each project, rather than having full-time state liaisons who inevitably find projects that fit their expertise rather than providing the expertise the state needs. In addition, we propose a .53 FTE EDNW project manager to support management across all projects as well as the recruiting and onboarding of SMEs. This critical single point of contact will have a full view of the R11CC work. Each project will have a designated project lead ranging from .2 to .5 FTE depending on the scope and timeline. In addition, the Center will have 1.0 FTE from EDNW and FHI 360 to co-lead needs sensing, stakeholder engagement, communications and .12 FTE for an EDNW quality assurance

¹⁸ See figure 4 for a visual of the R11CC management and staffing plan. Details in this section are year 1 estimates.

lead. In total, the Center includes nearly 9.0 FTE across the operating partners and roles. In our experience, this arrangement allows maximum resources to be directed to projects.

Hiring and Staffing System

For this project, we will use a dynamic staffing approach that leverages EDNW and our operating partners' broad pool of in-house and consultant experts so we can respond nimbly to new and evolving capacity-building needs and priorities and avoid the costly, time-consuming process of posting a new position for hire. This will enable us to quickly reassign staff members to task teams throughout the five-year project and minimize any negative impact of staffing changes or shifts in priorities or timelines. R11CC staff members will work in interdisciplinary teams assembled to provide the content expertise and technical knowledge to support state needs. Teams will be organized to provide flexible and responsive services.

EDNW employs more than 75 professional staff members, including experienced capacity-building providers and content experts with knowledge and experience in implementing evidence-based practices in math, literacy, core instruction, assessment, educator shortages, and systems alignment. Our team also has experience supporting state implementation of ESEA plans, working with underserved populations, and improving programs using data and audit findings. Child Trends and FHI 360 bring an additional seven experienced staff members and a deep bench of potential SMEs. Should we need to hire externally, we have the organizational infrastructure and capacity to recruit and hire new staff members. EDNW's full-time HR team uses the Trakstar applicant tracking system to prescreen applicants,¹⁹ then submit top candidates to a hiring panel for interviews.

¹⁹ <https://hire.trakstar.com/features/applicant-tracking-system>

EDNW has facilities and equipment to support all CC personnel. Our Portland, Oregon, headquarters includes nearly 35,000 square feet of workspace. Our 26 conference rooms are equipped with distance-learning platforms and conferencing tools and can accommodate anywhere from one to 100 people. We maintain a satellite office in Boise, Idaho, and have project team members based in all five states in Region 11. Our networking capabilities allow easy and frequent contact between staff members, operating partners, and client and recipient partners, including state-of-the-art tools for project management and tool development. We also maintain data licenses and a professional library. We have established procedures and protocols for collecting, maintaining, disclosing, and disposing of education records.

SME Pool and Vetting Process

SMEs bring additional expertise and, if integrated well, can be important change agents to move projects forward. We will develop and maintain a SME database that includes our current SME database as well as SMEs from the National CC, Content Centers, and other federal centers. Project manager Lymaris Santana will work with project leads, operating partners, and other centers to identify SMEs and/or TA experts for the work. The database will include information about SMEs' areas of expertise and experience. We will review the database regularly to ensure it represents a broad scope of topical expertise and diverse experiences and perspectives. Upon completion of a project, we will update the SME database to reflect performance and feedback.

All SMEs will be required to undergo a vetting process by submitting a resume and a work artifact such as a research article, presentations, or products developed for a TA project. The vetting process will also consider geographic location, education and credentials, and professional experience to determine whether the SME has the necessary skills and knowledge to match project needs. We will also capture relationships, contextual knowledge, and

availability, although we plan to support contextual knowledge through our onboarding process. We will work with the program officer and CC Network to update the SME database as needed. SMEs will be monitored and evaluated through participation on project teams, meetings, review of materials produced, and feedback from clients.

Onboarding

We employ systematic onboarding procedures to acclimate new hires to EDNW, in addition to project-specific onboarding. Modeled after our current Region 17 CC onboarding guide, we will create a R11CC onboarding guide for staff members and SMEs with information on standards for project work, norms, file structures, communication, and other relevant processes. Once assigned to a project, staff members and SMEs will engage in an orientation session to ensure they understand the project, role and expectations, and timeline for deliverables. They may also review project overview documents, participate in team meetings, and engage in a Q&A session with the leadership team. We have learned that new staff members need to understand the relationships, landscape, and strengths and challenges of the work before jumping in with SEAs and other stakeholders. We support project staff in this by having them shadow an existing team member and/or work on smaller tasks before taking on bigger roles. For SMEs, we establish clear roles, responsibilities, and deliverables. Because SMEs often join a project for only one piece of work, onboarding and role clarity is especially critical for success.

Learning Culture

Each EDNW staff member completes a professional development plan annually that identifies skill and content growth areas to meet through internal and external professional development opportunities. For example, this year we are offering organizational-wide professional development on Crucial Conversations. In addition, R11CC staff members will fully engage in CC Network peer learning opportunities as learners and contributors (PRRC6). Our

staff has contributed to multiple National CC workgroups, including Teacher Recruitment and Retention, Social Emotional Learning, and Accelerated Learning.²⁰ For example, EDNW staff members led a Teacher Recruitment and Retention workgroup session on the best evidence in support of Grow Your Own frameworks. For the Accelerated Learning workgroup, members of our team led professional learning sessions on artificial intelligence and its emergence in education, in addition to presenting at both the 2023 and 2024 national ESEA conferences.

Supervision and Feedback Loops

The R11CC co-directors and project leads will meet regularly to assess any performance or fit issues. For R11CC project reporting, project leads will report to the co-director most directly connected to the work. This direct reporting, without middle managers, is the most efficient way to identify and address potential project or personnel issues. Across EDNW, supervisors meet monthly to ensure consistent implementation of staff goal setting, mid-year and year-end performance reviews, and completion of individual professional development plans. We solicit feedback from clients and team members regularly in project review meetings and annually from senior organizational leadership through a client satisfaction survey. EDNW selects subcontractors with demonstrated capacity to meet quality performance standards; assigns well-defined tasks matched to each subcontractor's demonstrated capacity; develops clearly defined work scopes with timelines and milestones; and uses established processes and tools to direct and monitor performance, including regularly scheduled calls to coordinate activities.

B4. INTENTIONAL APPROACH TO COLLABORATION AND PARTNERSHIP

In our experience with past CCs, and working in this region in particular, partnerships are the foundation for change in organizational, educator, and student outcomes. CCs require

²⁰ <https://compcenternetwork.org/ccnetwork-highlights/topic/7119/accelerated-learning>

partnerships to launch, scale, and sustain evidence-based programs. This is evident in our descriptions of past projects (see section C2) as well as the projects we proposed for R11CC (see section A): each of our past and proposed projects list key partners.²¹ Furthermore, EDNW understands the importance of identifying intersection points and working with other federally funded providers to optimize resources and maximize impact. Our R11CC team is not only knowledgeable about the network of TA providers but also has strong working relationships with many. For this scope of work, we established four types of partnerships described below: operating partners, federal network partners, local partners, and SME partners. Our approach to developing partnerships with these and other experts is outlined in section C3.

Operating Partners

Operating partners are the core group of organizations working together to operate and run the core projects for R11CC (i.e., EDNW, Child Trends, FHI 360, and Concord Evaluation Group). We know these partnerships bring expertise and value from the start due to our demonstrated track record of success working together (highlights below):

- EDNW advises on youth voice studies led by **Child Trends**. One includes case studies of youth advocacy efforts and related policy outcomes, with a focus on opportunity youth and youth with experience in foster care. Another includes a landscape scan of youth voice opportunities in Atlanta.
- With **FHI 360**, EDNW co-designed, developed, and has begun implementing three unique professional learning series to build the capacity of Oregon educators to implement early indicator and intervention systems legislation. Each series includes virtual workshops, personalized job-embedded district coaching, e-modules for asynchronous learning, and a

²¹ Letters of support from committed and potential local, state, and regional partners are provided in “Letters of Support Attachment.”

set of tools and resources to make the learning actionable. By leveraging FHI 360's expertise in early indicator and intervention systems, EDNW's expertise in designing asynchronous learning experiences, and our combined skill in facilitating professional learning, we have delivered this experience to over 180 educators across Oregon.

- With **Concord Evaluation Group**, EDNW collaborates on the evaluation of Region 17 CC. The evaluation uses an internal and external approach and focuses on collecting and using data to produce formative and summative results about Center TA and the extent to which the project meets federal performance measures and overall Center outcomes. The partnership ensures efficient data collection and use while bringing an independent, objective lens and offering credibility in the field when collecting data.

Federal Network Partners

Federal network partners are critical for tapping into subject expertise, sharing practices across regions, and building a broader solution set for intensive capacity-building supports and related tools. Our project experience and successes are evident by our exemplary track record running a CC and by federal network partners inviting us to be a part of other work, including the National CC. Below, we discuss how we will collaborate with REL Northwest and connect with, inform, and leverage the federal TA system.

REL Partnership. For many years, EDNW operated both REL Northwest and its overlapping regional CCs. We are deeply familiar with the complementary but distinct focus of the two entities, with RELs focused on research and analytic capacity and CCs on designing and implementing education reforms. Our proposed co-director Jennifer Esswein served as the REL Northwest deputy director for several years. We also have a track record of success in collaborating across RELs and CCs to implement evidence-based practices. For example, in 2022–2024, our team at Region 17 CC collaborated with REL Northwest on the Montana ELA

standards revision project. REL Northwest conducted a review of evidence related to literacy, then shared findings in multiple formats with Region 17 CC and OPI. The OPI and CC team facilitated review of REL's reports with the standards revision workgroup to guide them in developing standards that reflect the latest literacy evidence-based practices. The standards are currently in the final revision process and being prepared for negotiated rulemaking.²²

In April 2024, EDNW met with Katie Drummond, current REL Northwest director, to brainstorm ways we can work together for needs sensing and service provision (see Stakeholder Engagement section for further description of this plan). We committed to:

- Conduct annual needs sensing and stakeholder engagement collaboratively, reducing burden on participants.
- Conduct joint status meetings with SEA leadership.
- Engage in regular calls to update on emerging needs, lessons learned, challenges, relationships and partnerships, and project work to determine opportunities for collaboration in support of states and local education systems. Calls will include Center directors, evaluation leads, stakeholder engagement leads, and relevant project leads.

Other Federal Partnerships. The U.S. Department of Education funds and supports an extensive TA network. We believe it is important to efficiently use these resources and maximize their impact for states and local educational systems. In addition, state, regional, and local clients and recipients need and appreciate a Regional Center that understands this network, has strong relationships across the network, and can strategically make connections to achieve shared goals and intended outcomes.

²² <https://sites.google.com/opiconnect.org/mtcontentstandardsrevision/english-language-arts>

Over the past 58 years, EDNW has fostered strong relationships with federally funded centers, and the proposed R11CC team has a history of engaging with the federal TA network. For example, EDNW staff members currently serve as SMEs on the National CC—Mandy Smoker Broadus, a proposed project lead for R11CC, is a SME for Native education;²³ Jennifer Esswein, proposed R11CC co-director, currently co-directs the Region 17 CC; and key project staff member Cortney Rowland was deputy director of a past Content Center (Center on Great Teachers and Leaders). Table 10 lists TA providers (mostly federally funded) that we connected with to develop this proposal, the liaison who agreed to be the point of contact for R11CC, and a short description of each center and how it intersects with our scope of work.

Table 10. Technical Assistance Providers to Collaborate with Region 11

Federally Funded Center	Liaison	Description of the Center and Role for Region 11
Center on Multi-Tiered Systems of Support (MTSS)	Sarah Frazelle	The MTSS Center supports states and districts in implementing an MTSS framework that integrates data and instruction within a multi-level prevention system to maximize student achievement and support students' social, emotional, and behavior needs. The MTSS Center may serve as a resource for school improvement and intervention projects in Idaho and Montana.
Collaboration for Effective Educator Development, Accountability, and Reform (CEEDAR) Center	Lynn Holdheide	The CEEDAR Center supports students with disabilities in achieving college- and career-ready standards by building the capacity of state personnel preparation systems to prepare teachers and leaders to implement evidence-based practices within MTSS. The focus of the CEEDAR Center aligns with Regional Center focus areas. They will be available for collaboration and support on emerging needs projects.
Educator Registered Apprenticeship (ERA) Intermediary	Olivia Rice	The ERA Intermediary supports state and local education agencies, offering guidance and support in building apprenticeship programs. The ERA Intermediary will serve as a resource for the identified educator shortages project in Alaska.
National Center for Homeless Education (NCHE)	George Hancock	NCHE operates the U.S. Department of Education's TA and information center for the federal Education for Homeless Children and Youth Program. The focus of NCHE aligns with Regional Center focus areas. They will be available for collaboration and support on emerging needs projects.

²³ <https://compcenternetwork.org/node/7541>

Federally Funded Center	Liaison	Description of the Center and Role for Region 11
National Center on Improving Literacy (NCIL)	Nancy J. Nelson	NCIL is a partnership among literacy experts, university researchers, and TA providers who aim to increase access to, and use of, evidence-based approaches to screen, identify, and teach students with literacy-related disabilities including dyslexia and to build individual and organizational capacity to assess students' literacy-related skill, identify students with disabilities or those at risk of disabilities, and fully implement evidence-based literacy programs and professional development. NCIL will serve as a resource for identified literacy projects in Alaska, Oregon, and Washington.
National Center on Intensive Intervention (NCII)	Sarah V. Arden	NCII helps state and local leaders, including school, district, and state administrators and staff responsible for leading MTSS and special education initiatives, find tools and resources to support data-based individualization implementation. The focus of NCII aligns with Regional Center focus areas. They will be available for collaboration and support on emerging needs projects.
National Comprehensive Center	TBD post award	The National CC develops and delivers high-quality capacity-building products and services to address pressing education needs and common challenges. It also works to identify and elevate emerging needs and share stories from the field to spread evidence-based practices and build capacity. R11CC will connect and collaborate with the National CC on all relevant projects to support capacity-building services and obtain and retain the services of SMEs. We will also collaborate on the CC peer learning network and outreach and dissemination of services.
National Content Centers	TBD post award	The Content Centers will provide targeted and universal capacity-building services focused on the educator workforce; early learning; English learners and multilingualism; and fiscal equity to improve educational opportunities, educator practice, and student outcomes. R11CC will connect and collaborate with all four Content Centers on relevant projects to support capacity-building services and obtain and retain the services of SMEs.
National Early Care and Education (ECE) Workforce Center	Kathryn Tout	The National ECE Workforce Center supports the early childhood workforce by identifying effective policies and strategies through research and evaluation, translating lessons from research for practice, and supporting innovations in states and communities through TA. The National ECE Workforce Center will serve as a resource for early learning projects in Alaska and Washington.
National Student Support Accelerator (NSSA)	Kathy Bendheim	NSSA is a program of the Stanford Accelerator for Learning and Systems Change for Advancing Learning and Equity at Stanford University. NSSA translates promising research about how tutoring can benefit students into action on the ground. The focus of NSSA aligns with Regional Center focus areas. They will be available for collaboration and support on emerging needs projects.

Federally Funded Center	Liaison	Description of the Center and Role for Region 11
The National Technical Assistance Center for the Education of Neglected or Delinquent Children & Youth (NDTAC)	Obioma Okogbue	NDTAC, led by operating partner Child Trends, serves as a national resource center to provide direct assistance to states, schools, communities, and parents seeking information on the education of children and youth who are considered neglected, delinquent, or at risk. The focus of NDTAC aligns with Regional Center focus areas. They will be available for collaboration and support on emerging needs projects.
Northwest Indian Language Institute (NILI) at the University of Oregon	Robert Elliott and Joana Jansen	NILI supports and strengthens language preservation and revitalization efforts. With Tribal, academic, and community partners, NILI establishes collaborative, ongoing projects which meet the specific needs and desires of each language community. NILI will serve as a resource for the regional Native Education Network project and the language revitalization project in Oregon.
Parent Technical Assistance Centers (PTACs)	Michele Williers	The PEAK Parent Center is one of four regional PTACs operating across the country. The Center supports parents' connections to education in Alaska, Idaho, Oregon, and Washington. PEAK will serve as a resource and be available for collaboration across all R11CC projects.
REL Northwest	Katie Drummond	REL Northwest partners with stakeholders in Alaska, Idaho, Montana, Oregon, and Washington to develop evidence that informs decisions about policy, programs, and practice. REL Northwest partners with organizations on applied research and development; training, coaching, and technical support; and dissemination. As described in the Stakeholder Engagement section, R11CC will connect and collaborate with RELNW on all relevant projects.
Research on Education Strategies to Advance Recovery and Turnaround (RESTART) Network	Susan Therriault	The RESTART Network focuses on identifying and disseminating evidence-based strategies aligned with the needs of policymakers, leaders, and educators who serve and support accelerated student recovery efforts. The RESTART Network will serve as an overall resource to R11CC in the identification, implementation, and sustainability of evidence-based practices.
State Implementation and Scaling Up of Evidence Based Practices (SISEP) Center	Rebekah Hornak	SISEP is a national TA center focused on the use of implementation science to expand selection, adoption, and sustained use of evidence-based practices that result in equitable outcomes for students with disabilities. The focus of SISEP aligns with Regional Center focus areas. They will be available for collaboration and support on emerging needs projects.
Student Engagement and Attendance Center	Cecelia Long	SEAC supports SEAs and LEAs in their efforts to reduce chronic absenteeism and increase student engagement. The focus of SEAC and Attendance Works aligns with Regional Center focus areas. They will be available for collaboration and support on emerging needs projects.

Federally Funded Center	Liaison	Description of the Center and Role for Region 11
(SEAC) and Attendance Works		
Western Educational Equity Assistance Center (WEEAC)	Niki Sandoval and Tina Tranzor	WEEAC is one of four Equity Assistance Centers (EACs) that provides TA and training to promote equitable education opportunities and resources. WEEAC will serve as a resource for all R11CC projects.

Because we conducted these conversations in advance, we are confident we will have the required collaborative agreements within 90 days of award. Through experience we know that, despite having strong relationships, it is a challenge to track the work of every center, navigate roles between regional and national CCs and other centers, and identify best fits to engage specific centers in CC work. To leverage the expertise of these centers and reduce client burden, we will engage in working groups and collaborative learning facilitated by the National CC, including the CC Network peer learning opportunities. Our intent is to engage other centers and their clients and recipients in our work and to offer our learnings and support in areas we lead. For example, we know that SEAs in particular value learnings from other states; our approach is an ideal path to making those connections. In light of past practice, we anticipate that other federally funded centers will engage in National CC activities to share their work. Being present **Local Partners**reast of new tools and resources available to support Region 11 states.

The projects described in section A include information about local, state, and regional partners we will engage for the proposed work, many of whom we already have relationships with or partner with on other projects. No other organization has the depth and breadth of partners in Region 11 as EDNW. These relationships bring additional credibility, insights, and guidance to complex state projects and position them as national models for scale-up and replication. We currently operate over 70 projects in Region 11, which involve partnerships with:

- Every SEA, two Tribes/Tribal councils, and 15 local school districts
- Local and state-based partners, including: Alaska Association of School Boards; Alaska Humanities Forum; Alaska Policy Research Alliance; Bristol Bay Native Corporation Education Foundation; Bristol Bay Region CTE program; the University of Alaska Anchorage School of Education; Montana’s educator preparation programs; Children’s Institute (OR); Oregon Higher Education Coordinating Commission; Oregon Educator Advancement Council; Oregon State University; Portland State University; University of Oregon; Oregon’s Teacher Standards and Practices Commission; Washington State Education Research and Data Center; Partnerships for Action, Voices for Empowerment; Road Map Project; and Roots of Inclusion

Subject Matter Expert Partners

To build this proposal, EDNW tapped into existing networks, partnerships, and relationships as well as our knowledge of the field to build a list of on-call SMEs who agreed to support the proposed scope of work as needed and be named in the proposal. We identified SMEs based on their expertise in focus areas as well as knowledge of and experience with the Northwest region. For example, Dr. Marguerite Roza is director of the Edunomics Lab and a research professor at Georgetown University who focuses on using data in financial decision-making to promote equity, productivity, and innovation to benefit students. Dr. Roza will serve as a SME on implementation of ESEA programs, resource allocation, and accountability. Dr. Darris R. Means is currently executive director for rural and community-based education and an associate professor at the University of Pittsburgh.²⁴ Dr. Means’ work focuses on developing networks of rural schools, districts, and communities to identify problems of practice and work

²⁴ Dr. Means will soon transition to Clemson University.

together and address those problems using community assets. Rolanda W. Baldwin is also a confirmed SME. Ms. Baldwin is vice president for program design at UnboundEd. She focuses on the design and implementation of math programs that intersect with rigorous standards-aligned math concepts and culturally relevant and responsive instruction. A list of SMEs for this proposal and their areas of expertise can be found in table 11 in section C1.

C. SUBJECT MATTER AND TECHNICAL ASSISTANCE EXPERTISE

C0. ENCOURAGES APPLICANTS FROM HISTORICALLY UNDERREPRESENTED GROUPS

EDNW has a track record of recruiting and retaining highly qualified, diverse staff members. Our vision statement, “excellent and equitable education for all,” draws individuals who are committed to equity. Since 2018, we have increased our full-time staff who are Black, Indigenous, and people of color (BIPOC) from 20 percent to 33 percent. We accomplished this by intentionally writing job postings to attract wider audiences, giving credit for lived experiences, and including the following statement in every job posting:

Education Northwest is an Affirmative Action/Equal Employment Opportunity employer. We particularly encourage applications from members of historically underrepresented racial and ethnic groups, women, individuals with disabilities, veterans, LGBTQIA2+ community members, and others who demonstrate the ability to help us achieve our vision of a diverse and inclusive community—even if you don’t believe you meet every one of the qualifications described above.

We also broadened our candidate pools by posting on Indeed and LinkedIn, yielding hundreds of applicants for each position, and including at least one BIPOC candidate as a finalist for all positions—ensuring more opportunities for racially and ethnically diverse candidates to interview with our team. In 2024, EDNW set a goal for 35 percent diversity among staff and 30 percent diversity among leadership and board members.

To staff this project, EDNW and our operating partners identified individuals with the right expertise, qualifications, and lived experience to carry out the work. This includes Native staff members to lead Native education work, staff members with experience as English learners to lead multilingual learner projects, former teachers and leaders in rural districts to carry out rural work, and experienced mentors to lead mentoring work. Our efforts resulted in a diverse project team by race, ethnicity, experience, age, gender, and lived experience.

C1. KEY PROJECT PERSONNEL

The proposed R11CC team represents a cadre of subject matter and TA experts with experience as building and classroom leaders, district and state education leaders; intensive TA providers, and national advisors. We propose that both our current Region 17 CC co-directors continue working in Idaho and Montana, with additional staff capacity added for Alaska, Oregon, and Washington. Recognizing the importance of relationships, we propose staff members who have existing experience, expertise, and relationships in the region. In addition, we assembled a cohort of on-call SMEs, external to the formal R11CC team, who have deep subject matter knowledge in regional and state focus areas and extensive experience providing intensive TA at various education system levels, including in the region. We envision adding new on-call experts as the needs of the field evolve.

Collectively, the team represents seasoned practitioners and individuals with significant and demonstrated expertise across the focus areas outlined in the scope of work. Table 11 lists all subject matter and TA experts available to the proposed R11CC project and their areas of expertise. Short bios for key project personnel appear below the table.²⁵

²⁵ Resumes for key project personnel can be found in the Key Project Personnel Resume Attachment.

Table 11. Subject Matter and Technical Expertise of R11CC Key Personnel and Supporting Staff Members

	Subject Matter Expertise										Technical Assistance Expertise				
	Addressing Educator Shortages	High-Quality Assessment Systems	Supporting Core Instruction - Math	Supporting Core Instruction - Literacy	Supporting Specific Student Populations ^a	Conditions to Accelerate Learning ^b	Pathways to Multilingualism	School Improvement, Title I, Resource Allocation Reviews	Knowledge of and Experience with State and Local Education Systems	Knowledge of ESEA and Current Education Issues	Collecting and Reporting Data on ESEA	Needs Sensing, Stakeholder Engagement, and Communications	Aligned and Integrated Agency Systems (Systems Coherence and Improvement)	Implementation Science and Systems Change	Intensive TA and Adult Learning Principles
Lead Key Project Personnel*															
Jennifer Esswein (EDNW) <i>Co-Director</i>	●	●						●	●	●	●		●	●	●
Christine Pitts (EDNW) ⁺ <i>Co-Director</i>	●	●		●	●			●	●	●					
Lymaris Santana (EDNW) <i>Project Manager</i>				●			●		●	●			●	●	●
Jacob Williams (EDNW) <i>Project Lead</i>			●	●	●	●			●	●			●	●	●
Jennifer Johnson (EDNW) ⁺ <i>Project Lead</i>					●		●		●	●					●
Manuel Vazquez (EDNW) ⁺ <i>Project Lead</i>							●		●	●					●
Catherine Barbour (EDNW) <i>Quality Assurance</i>								●	●	●	●		●	●	●
Elizabeth Gandhi (EDNW) <i>Needs Sensing, Engagement, and Communications Co-Lead</i>									●			●			
Misha Galley (FHI 360) <i>Needs Sensing, Engagement, and Communications Co-Lead</i>									●			●			

	Subject Matter Expertise										Technical Assistance Expertise				
	Addressing Educator Shortages	High-Quality Assessment Systems	Supporting Core Instruction - Math	Supporting Core Instruction - Literacy	Supporting Specific Student Populations ^a	Conditions to Accelerate Learning ^b	Pathways to Multilingualism	School Improvement, Title I, Resource Allocation Reviews	Knowledge of and Experience with State and Local Education Systems	Knowledge of ESEA and Current Education Issues	Collecting and Reporting Data on ESEA	Needs Sensing, Stakeholder Engagement, and Communications	Aligned and Integrated Agency Systems (Systems Coherence and Improvement)	Implementation Science and Systems Change	Intensive TA and Adult Learning Principles
Other Key Personnel TA Providers and Content Experts Supporting Projects*															
Christine Andrews (Concord Evaluation Group) <i>Evaluation Lead</i>									●	●		●		●	
Mandy Smoker Broadus ⁺ (EDNW)					●				●	●					●
RunningHorse Livingston (EDNW)			●		●				●	●					●
Cortney Rowland (EDNW)	●								●	●			●	●	●
Silvana Hackett ⁺ (Child Trends)					●			●	●						
Ben Cronkright (Child Trends)	●				●	●			●				●	●	
Tameka Porter (Child Trends)					●		●		●		●		●	●	●
Obioma Okogbue (Child Trends)	●				●	●		●	●	●	●		●	●	●
Rebecca Jones (Child Trends)	●		●		●	●		●	●	●				●	●
On-Call Subject Matter Experts [^]															
Shelby Cooley (EDNW) ⁺					●				●						
Rose Honey (AEM) ⁺					●				●	●					
Kailey Bunch-Woodson (AEM) ⁺				●	●				●	●					
Emily Rang (AEM) ⁺					●				●	●					
Barbara Adams (Adams Analytics) ⁺ <i>Project Lead</i>	●								●	●					
Christina Linder (Consultant) ⁺	●								●						●

	Subject Matter Expertise										Technical Assistance Expertise				
	Addressing Educator Shortages	High-Quality Assessment Systems	Supporting Core Instruction - Math	Supporting Core Instruction - Literacy	Supporting Specific Student Populations ^a	Conditions to Accelerate Learning ^b	Pathways to Multilingualism	School Improvement, Title I, Resource Allocation Reviews	Knowledge of and Experience with State and Local Education Systems	Knowledge of ESEA and Current Education Issues	Collecting and Reporting Data on ESEA	Needs Sensing, Stakeholder Engagement, and Communications	Aligned and Integrated Agency Systems (Systems Coherence and Improvement)	Implementation Science and Systems Change	Intensive TA and Adult Learning Principles
Jessica Newman (AIR)						●									
Darris Means (Rural Education at Clemson University)					●										
Sarah Powell (University of Texas at Austin)			●												
Rolanda Baldwin (UnBoundEd)			●												
Marguerite Roza (EduNomics)								●							
David Donaldson (NCGYO)	●														
Cecelia Long (Attendance Works)						●									
Amaya Garcia (New America)	●								●				●	●	●
Nancy J. Nelson (National Center on Improving Literacy)				●						●			●	●	●
Lynn Holdheide (AIR)	●				●				●	●			●	●	●
Anne Hyslop (All4Ed)								●	●	●	●			●	

^aSME lives in Region 11. ^bBios appear below, and resumes appear in the Key Project Personnel Attachment. ^cResumes appear in the On-Call SME Attachment.

a. Specific populations includes low-income students, students of color, rural students, Tribal students, English learners, students with disabilities, early childhood students, students in foster care, migratory students, immigrant students, neglected students, students who are delinquent, and students experiencing homelessness. Student population(s) in which the identified staff person has expertise supporting can be found in their bios.

b. According to the NIA, this includes tutoring, summer, and after-school; reducing chronic absenteeism; and student engagement. The areas for which the identified staff person has expertise in can be found in their bios.

Bios for Region 11 Key Personnel

This section provides bios, ordered by project role, that highlight the most recent and relevant information for the key personnel proposed to support R11CC.²⁶ Full role descriptions are in Appendix B and resumes with additional evidence of experience are attached. We assembled a team that brings the knowledge, skills, experience, and relationships needed to provide outstanding services to the region and work in concert with the larger federal network.

Jennifer Esswein – Center Co-Director and Project Lead for Idaho’s Teacher Mentoring and State-Delivered Federal Programs Projects

Jennifer was selected as R11CC co-director because of her deep experience leading CC and REL work in the region and her history of providing outstanding intensive TA services, particularly in Alaska, Idaho, and Montana.

Current Work	Dr. Jennifer Esswein is a program director at EDNW and current co-director of Region 17 CC. She has over 10 years of experience living and working at the intersection of research and TA in the Northwest. As Region 17 CC co-director, Dr. Esswein leads Center oversight, work planning, budgeting, and partnerships and attends REL Northwest Governing Board meetings. She also leads multiyear intensive TA efforts in Idaho and Montana, supporting redesign of the school rating system through growth indicator modeling in Idaho and building and evaluating the Montana Teacher Residency Demonstration Project.
Past Roles and Contributions	<ul style="list-style-type: none"> As deputy director for REL Northwest at EDNW, she managed cross-center relationships among the REL, CC, and other federal centers in addition to overseeing research and evaluation projects Dr. Esswein provides Alaska DEED with annual accountability support related to school ratings Before joining EDNW, Dr. Esswein directed accountability work for the Tennessee Department of Education, where she enhanced the state's accountability system to improve efficiency, accuracy, and transparency
Evidence of Capacity-Building and Content Expertise	<p>Dr. Esswein has been designing and leading Center- and project-level intensive TA for Region 17 CC and other clients for over 10 years. She has developed and delivered trainings on the ESSA tiers of evidence, including on the creation of logic models and corresponding measurement plans. She has also supported SEAs in the development of instruments to measure program-level impact. Dr. Esswein is a What Works Clearinghouse Certified Reviewer.</p> <p>Her expertise extends to complex data collection and research, including survey development, data analysis, and communicating outcomes, but her passion lies at the intersection of research and practice, implementing and scaling what works.</p> <p>Dr. Esswein holds a doctorate in quantitative research and evaluation in education from The Ohio State University.</p>

²⁶ “Key Personnel” includes staff members identified in the organizational chart in figure 4.

Christine Pitts – Center Co-Director and Project Lead for the Regional Native Education Network and Oregon’s Early Literacy Tribal Consultation Project

Dr. Pitts was selected to co-direct RIICC with Dr. Esswein because she brings complementary knowledge and experience as well as a long history of work and relationships in the region, especially Oregon and Washington.

Current Work	Dr. Christine Pitts is an education policy leader and TA expert working with state and national organizations to implement evidence-based policies with fidelity, adaptability, and equity at the forefront. Most recently, as a trusted education policy consultant, Christine worked with Teach Plus to lead a national study of the barriers keeping teachers from fully implementing the science of reading. She also supported a student-led qualitative study of how students' voices are barred from school district budgeting decisions. Dr. Pitts is a Senior Fellow at EDNW focusing on assessment and accountability, literacy, and education governance. <i>Dr. Pitts lives in Oregon.</i>
Past Roles and Contributions	<ul style="list-style-type: none"> As an advisor at NWEA, Dr. Pitts led a national agenda on the future of assessment and accountability, working closely with state leaders and other partners to improve and advance quality assessment practices for students, teachers, and families—especially using data to improve instruction and equity in local systems At the Oregon Education Investment Board, she provided intensive TA on policy analyses and regional governance models in collaboration with the governor’s office Dr. Pitts consulted with Oregon’s Educator Advancement Council to study progress toward teacher diversity goals and publish the annual educator equity report to the legislature While leading impact and communications at the Center on Reinventing Public Education in Washington, Dr. Pitts examined statewide charter school enrollment trends and related policy implications
Evidence of Capacity-Building and Content Expertise	<p>During the pandemic, Dr. Pitts led a series of TA convenings with assessment experts nationwide to support states and districts moving forward with assessment practices and accountability reporting after the pandemic. She recently served on the U.S. Chamber’s Future of Data working group, stewarding the first mixed-methods evaluation of federal accountability policies over the last 20 years.</p> <p>Dr. Pitts holds a bachelor’s in elementary education and a master’s in reading education from East Carolina University, and a doctorate in education leadership and policy at the University of Oregon.</p>

Lymaris Santana – Center Project Manager and Project Lead for Alaska’s Literacy Project

Dr. Santana was chosen for these roles because she is a stellar project manager with expertise in delivering intensive literacy TA to states, districts, and schools.

Current Work	Dr. Lymaris Santana is a senior advisor for equity and systems improvement at EDNW. For the past two years, she has worked extensively in Region 11, including projects such as the CTE programs of study review and multilingual learner strategic plan in Oregon, English learner supports and mentoring in Idaho, and the MAST assessment item review in Montana.
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Past Roles and Contributions	<ul style="list-style-type: none"> Dr. Santana is a certified reading specialist with more than 20 years of experience as an educational leader at the school, district, and state levels. She has led multiple MTSS teams with an emphasis on interventions, enrichment, and compliance. As regional literacy director for the Florida Department of Education, Dr. Santana provided technical support to district and school leaders in the implementation of literacy standards and evidence-based early literacy instruction. She has extensive experience serving multilingual communities, designing and providing professional learning on evidence-based practices for multilingual learners, and engaging families from culturally diverse communities.
Evidence of Expertise	<p>At EDNW, Dr. Santana has managed the Steering Committee Coaching Project for Evergreen School District in Washington, two clusters of CTE programs of study review for ODE, and was lead liaison for the Regional Advisory Committees, providing logistics support and managing tasks to keep projects on time, on scope, and on budget. She is adept in a variety of project management tools, such as Gantt charts, Smartsheet, Microsoft Project, and Agile methodology. Dr. Santana has managed several large state and federal grants, such as the federal partnership grant between Seminole County Public Schools and the Florida Center for Reading Research.</p> <p>She holds a bachelor's degree in English; master's degrees in leadership and instruction, reading, and administration; and a doctorate in leadership and literacy.</p>

Jacob Williams – Project Lead for Montana's Learning Standards and Comprehensive School Reform Projects

Dr. Williams was selected as a project lead because of his relationships and contextual and content expertise in delivering intensive TA in the region.

Current Work	Dr. Jacob Williams has supported SEAs and schools through EDNW, REL Northwest, and CCs since 2014. As current co-director of Region 17 CC, Dr. Williams maintains strong relationships and leads multiple projects in the Northwest region, including academic standards revision in Idaho and Montana, supporting Montana OPI to develop stakeholder engagement guidance for CSI schools, and facilitating Idaho SDE to develop and implement a process to distribute ESSER funds.
Past Roles and Contributions	<ul style="list-style-type: none"> Dr. Williams currently leads an investigation of effective practices for opportunity youth reengagement programs, funded by the Annie E. Casey Foundation Prior to joining EDNW, from 2016–2019 he served as an on-site school improvement consultant for the Rocky Boy School District in Montana—a district located on Rocky Boy's Indian Reservation with a student population that is more than 90 percent Native Prior to earning his doctorate, Dr. Williams was a middle school special education teacher in Kentucky
Evidence of Expertise	<p>In addition to his Region 17 CC work with Idaho and Montana, Dr. Williams currently supports ODE in a multiyear intensive TA project to develop and deliver professional learning on early indicator and intervention systems (i.e., early warning systems) for district staff statewide.</p> <p>Dr. Williams earned his master's degree in education at Murray State University–Kentucky and his doctorate in special education at the University of Texas.</p>

Jennifer Johnson – Project Lead for Washington’s Learning Standards and Support for Early Learning and Transition to Kindergarten Projects

Ms. Johnson was selected as a project lead because of her extensive knowledge, skills, relationships, and relevant experience delivering intensive TA services in the region.

Current Work	As a senior consultant for equitable learning and systems improvement at EDNW, Jennifer Johnson provides TA to schools and districts in Oregon and Washington, facilitating professional learning and project management. For example, Ms. Johnson currently leads communities of practice for the Washington Statewide Family Engagement Center (operated by EDNW), conducts multilingual and Title/LAP program evaluations in North Thurston Public Schools in Washington, and facilitates development of ODE’s multilingual learner strategic plan. <i>Ms. Johnson lives in Washington.</i>
Past Roles and Contributions	<ul style="list-style-type: none"> For 25 years, Ms. Johnson has served across Washington’s K–12 education landscape as a district-level multilingual program director, school principal, instructional coach, classroom teacher, and multilingual consultant Over the past seven years, she has been a member-leader on OSPI’s dual language steering committee, a collaborative network of leaders working to advance dual language programming and resources statewide She served as the state-level WIDA trainer for administrators and superintendents when Washington adopted the WIDA English language development standards Her classroom and instructional coaching experience includes many years of service in Title I schools with large immigrant populations
Evidence of Expertise	<p>Ms. Johnson provides technical assistance and professional learning to schools and districts nationwide, with a comprehensive project portfolio in Washington and Oregon. Her areas of expertise include instructional leadership, strategic planning for school improvement, equitable practices in multilingual education, and MTSS. Ms. Johnson is bilingual and biliterate in Spanish and English.</p> <p>Ms. Johnson earned her bachelor’s degree in Spanish and political science from the University of Washington and her master’s in human development from Pacific Oaks College. She also completed post-master’s training in educational leadership at Seattle Pacific University.</p>

Manuel Vazquez – Project Lead for Oregon’s Multilingual Learner Reporting Guidance

Dr. Vazquez was selected as a project lead for RIICC because of his ongoing work developing ODE’s multilingual learner strategic plan as well as his experience working at the intersection of research and TA in the region.

Current Work	Dr. Manuel Vazquez Cano is a bilingual, bicultural Latino immigrant and a managing researcher at EDNW. Dr. Vazquez has extensive experience collaborating with state and local education agencies through multiyear applied research and intensive TA projects. His expertise focuses on students classified as English learners, college readiness, and educator shortages. Currently, Dr. Vazquez is supporting ODE to develop a new strategic plan that provides a blueprint for state action to improve learning environments for multilingual learners. <i>Dr. Vazquez lives in Oregon.</i>
Past Roles and Contributions	<ul style="list-style-type: none"> Under REL Northwest, Dr. Vazquez published a study in partnership with Alaska state and local education agencies that examined the impact of English learner services on Alaska Native students He also published a REL Northwest study that examined educator turnover in Alaska and provided recommendations to improve retention

Evidence of Expertise	<p>In addition to the intensive TA described above, Dr. Vazquez has experience with large federal awards. For instance, he has led and supported multiple Office of English Language Acquisition National Professional Development grants in Oregon, Washington, and California. These grants aim to increase the number of pre-service and in-service teachers who are prepared to serve students classified as English learners.</p> <p>He earned a doctorate in quantitative research methods in education from the University of Oregon and is a What Works Clearinghouse Certified Reviewer (5.0 Standards).</p>
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Catherine Barbour – Quality Assurance Lead

Ms. Barbour was chosen as quality assurance lead because of her previous experience with federal TA centers, her knowledge of work across the region, and her experience with project and risk management.

Current Work	Catherine Barbour is EDNW’s senior director for equitable learning and system improvement. She currently provides quality assurance for Region 17 CC and has a direct reporting line to EDNW’s CEO, demonstrating the importance of this project to our organization. She leads project teams in the design and development of intensive and targeted TA services and products to support states, districts, and schools in their improvement efforts and currently oversees a portfolio of roughly 50 projects totaling \$8 million in annual revenue. She keeps a direct line into client service delivery and is currently engaged with North Slope Borough School district in Alaska working with district leaders to design and implement an instructional coaching framework.
Past Roles and Contributions	<ul style="list-style-type: none"> Ms. Barbour worked at American Institutes for Research where she directed the federally funded State Support Network and led teams in providing intensive and targeted TA on implementing professional learning communities, instructional coaching, and school improvement leadership coaching for turnaround principals Ms. Barbour led state, district, and school level school improvement projects in Illinois, Missouri, New York, and Virginia that resulted in statistically significant achievement gains
Evidence of Expertise	<p>Ms. Barbour successfully turned around three schools as a turnaround principal in suburban, urban, and rural school districts. She brought this expertise to additional schools and districts while providing and overseeing the delivery of intensive TA to schools across multiple states. At American Institutes for Research, Barbour co-designed capacity building for staff and clients in school turnaround and has spoken and published nationally regarding school turnaround and improvement.</p> <p>She holds a bachelor’s degree in elementary education from Christopher Newport University, a master’s degree in elementary school administration from The College of William and Mary, and a school turnaround specialist credential from the University of Virginia.</p>

Elizabeth Gandhi – Internal Evaluator and Co-Lead for Needs Sensing, Stakeholder Engagement, and Communications

Dr. Gandhi was selected for this role because of her experience evaluating Region 17 CC as well as for the continuous improvement-oriented approaches she brings to new projects.

Current Work	Dr. Gandhi is a senior researcher at EDNW currently engaged in multiple projects including the Region 17 CC, the evaluation of the Children's Institute Early School Success program in Oregon districts and schools, and the systemwide evaluation of the California Learning Acceleration Grant. In addition, she co-leads a research-practice partnership with Pacific University in Oregon on the National Science Foundation-funded project Understanding Noyce Scholar Career Trajectories: What Keeps Noyce Scholars Going?
Past Roles and Contributions	<ul style="list-style-type: none"> • Dr. Gandhi co-leads an evaluation with American Institutes for Research to examine how programs differentiate best practices to meet the cultural, linguistic, and learning needs of children enrolled in Seattle Preschool Program's Dual Language Initiative, inclusive special education classrooms, and family child care programs • Dr. Gandhi's other past work includes a system-wide evaluation of the Oregon Early Learning Hubs, a landscape scan of behavioral health and wellness services in Idaho, a REL project to develop a series of Oregon Association of Relief Nurseries Data Systems Trainings, an evaluation of the Center on School Turnaround, and a project working with Omaha Public Schools (OPS) to develop a district-wide theory of coaching
Evidence of Expertise	<p>She brings expertise in all phases of research and evaluation, including research and evaluation design; survey design; data collection methods including classroom observations, interviews, surveys, and focus groups; qualitative and quantitative research methods; project management; and reporting. She will bridge the evaluation and stakeholder engagement, needs sensing, and communication teams, guiding development of products and materials for dissemination.</p> <p>Dr. Gandhi holds a doctorate in applied developmental psychology and systems science from Portland State University, a master's in human development and family studies from Oregon State University, and a bachelor's in psychology from Lewis and Clark College.</p>

Michelle (Misha) Galley – Co-Lead for Stakeholder Engagement, Needs Sensing, and Communications

Ms. Galley was selected for this role because she excels in directing projects, creating innovative dissemination plans, maintaining relationships with internal and external stakeholders, and managing a team of communications professionals and SMEs.

Current Work	As director of communications and content strategy for FHI 360's U.S. Education Department and U.S. Business unit, she oversees all aspects of communications efforts; leads the communications team; and manages and maintains relationships with clients, partners, SMEs, and key stakeholders.
Past Roles	<ul style="list-style-type: none"> • Ms. Galley has 20 years of experience developing and implementing education communications strategies for large, complex organizations • Ms. Galley's past projects and roles include communications lead on the Wallace Foundation's District Summer Learning Network (DSLN), Communications and content lead on the Bill & Melinda Gates Foundation Connected and Engaged project, and Curriculum lead on the Consumer Finance Protection Bureau (CFPB).

Evidence of Expertise	<p>Ms. Galley has designed communications strategies and overseen creation of deliverables on topics such as whole child development, multilingual learners, family engagement, equity, financial literacy, college and career readiness, teacher leadership, early childhood education, COVID-19 response, Native education, workforce development, justice-involved youth, and positive youth development.</p> <p>Ms. Galley holds a bachelor's degree in English with a Communications Media Minor from State University of New York College at Fredonia.</p>
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Christine Andrews – External Evaluator

Dr. Andrews was selected for this role because of her current experience as external evaluator on Region 17 CC and her track record of partnering on evaluation work.

Current Work	Dr. Andrews routinely directs formative and summative evaluations of educational projects in formal and informal settings, focusing on learners and educators. Recent relevant projects include: external evaluator for Region 17 CC, CLASS Observations for Level 4 and Level 5 School Monitoring (State of Massachusetts), evaluation of MA PD Systems, evaluation of the Urban School Districts Initiative (Massachusetts), the Massachusetts Frameworks Evaluation, the MA Rethinking Equity and Teaching for English Language Learners evaluation, and the MA Wraparound Zone Initiative.
Past Roles	<ul style="list-style-type: none"> • Dr. Andrews founded Concord Evaluation Group in 2008 • She has served as external evaluator for REL Northwest • Before founding Concord Evaluation Group, she worked the American Institutes for Research
Evidence of Expertise	<p>Dr. Andrews has more than 15 years of experience developing and implementing external evaluations for federal and state centers and programs, including in coordination with an internal evaluation team. She has conducted evaluation research since 1990.</p> <p>She holds a doctorate in education research, evaluation, and measurement from the University of Pennsylvania.</p>

Mandy Smoker Broaddus – TA Provider and Content Expert: Native Education

Ms. Broaddus was selected for her regional and national expertise as an intensive TA provider working in Native education.

Current Work	Mandy Smoker Broaddus, a member of the Fort Peck Assiniboine and Sioux Tribes, has 20 years of experience working toward social justice, equity, inclusivity, and cultural responsiveness, particularly in the realm of American Indian education and cultural responsiveness. For the past six years, she has led Native education projects at EDNW. <i>Ms. Smoker Broaddus lives in Montana.</i>
Past Roles	<ul style="list-style-type: none"> • Ms. Smoker Broaddus has provided TA in the K–12, Tribal college, SEA, and nonprofit sectors to support and build capacity with numerous Tribes, school districts, and other community organizations • For 10 years she served as director of Indian education for the state of Montana

Evidence of Expertise	<p>Ms. Smoker Broaddus provides intensive TA in Native education across the country, including developing a statewide Native education plan for New Jersey; a needs assessment and strategic plan for Blackfeet Community College; and curriculum and instruction for multiple Tribes and the states of Oregon, Michigan, and Nevada. She is a SME on the current National CC and also serves on the technical review panels for the Office of Indian Education and the National Indian Education Study at the Department of Education.</p> <p>She received the 2015 National Indian Educator of the Year award by the National Indian Education Association and was appointed by President Obama to the National Advisory Council on Indian Education.</p> <p>Ms. Smoker Broaddus earned a bachelor's degree in education and English from Pepperdine University; a master's degree in American Indian studies from the University of California, Los Angeles; and a master of fine arts in fine arts and creative writing from the University of Montana.</p>
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RunningHorse Livingston – TA Provider and Content Expert: Mathematics and Native Education

Mr. Livingston was selected for his content expertise in math and Native education.

Current Work	<p>RunningHorse Livingston is a managing consultant specializing in mathematics education and culturally responsive instruction at EDNW. He is a key figure in 21st-century education, providing comprehensive professional and curricular development to help create inclusive math and STEM education environments for diverse students. He currently leads an effort to aid Michigan's Indigenous Education Initiative in developing decolonized teaching materials focused on the 12 Tribal communities in the state. Mr. Livingston is a proud citizen of the Bad River Band of Lake Superior Chippewa and is based in Madison, Wisconsin.</p>
Past Roles	<ul style="list-style-type: none"> • Mr. Livingston has provided standards-based instructional coaching and assessment development in over 100 schools nationwide • He has taught and designed math methods courses for 15 years in the Minnesota and Wisconsin community college systems
Evidence of Expertise	<p>Dedicated to improving teaching practices, standards, and materials, Mr. Livingston has collaborated with Tribes and rural communities across 30 states, with a specialty in providing intensive TA services. As part of the State Tribal Education Partnership in Idaho, Mr. Livingston assisted the Nez Perce Nation in developing Tribal teaching standards, adopted by the education department at nearby Lewis and Clark State College in 2021.</p> <p>Mr. Livingston holds a bachelor's degree in American Indian studies from the University of Minnesota Twin Cities and a master of education in curriculum theory and design from the University of Minnesota Duluth.</p>

Cortney Rowland – TA Provider and Content Expert: Addressing Educator Shortages

Dr. Rowland brings national expertise in educator shortages as well as extensive experience in the CC Network, ideally positioning her for this role.

Current Work	Dr. Rowland has 20 years of experience supporting states to continuously improve their systems for developing, supporting, and retaining an effective and diverse educator workforce. She currently serves as a Senior Leader for Large Scale Technical Assistance and Teacher Effectiveness at EDNW, designing and implementing technical assistance and capacity building projects focused on supporting educator workforce systems, and providing subject matter expertise.
Past Roles and Contributions	<ul style="list-style-type: none"> • Policy director at the National Center for Teacher Residencies where she supported state policymakers' efforts to develop and scale teacher residency and apprenticeship programs. • Principal technical assistance consultant at the American Institutes for Research (AIR), where she managed research, policy, and technical assistance projects related to teacher and leader effectiveness; contributed to strategic planning, quality assurance reviews, business development, and visibility and eminence-building efforts; and cultivated partnerships.
Evidence of Expertise	Co-deputy director of the Center on Great Teachers and Leaders (GTL Center) at American Institutes for Research as well as a team member on the National Comprehensive Center for Teacher Quality, the GTL Center's predecessor. She led the GTL Center multistate Collaborative for the Continuous Improvement of Educator Effectiveness Systems—a partnership of GTL, the West CC, and six states—as well as GTL's work on the equitable distribution of effective educators. ²⁷

Silvana Hackett – TA Provider and Content Expert: Supporting Students in Specific Populations and School Improvement

Current Work and Evidence of Expertise	Silvana Esposito Hackett is a senior research analyst in early childhood development at Child Trends. Her work focuses on policies that support the youngest and most vulnerable populations in achieving equitable education, health, and social outcomes, and she has extensive expertise in state-level early childhood administrative data. For example, Ms. Hackett supported Montana OPI in implementing a federal Preschool Development Grant (PDG) and worked with local and state Head Start leaders to integrate Head Start enrollment data into the state student information system. She built data systems to collect and link information on developmental assessments, early childhood learning environments, and early childhood workforce to support PDG work. Ms. Hackett also has experience with federal reporting requirements as well as designing and implementing program evaluations and needs assessments. <i>Ms. Hackett lives in Montana.</i>
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²⁷ <https://gtlcenter.org/state-collaborations/collaborative>; https://gtlcenter.org/evidence-based-strategies/equitable_access

Ben Cronkright – TA Provider and Content Expert: Idaho’s Continuous Improvement for State-Delivered Federal Programs Services Project
Current Work and Evidence of Expertise

Ben Cronkright, M.A., has expertise on various topics, including strengthening teacher pipelines, family and community engagement, school and district leadership, and systems improvement. In his TA, Mr. Cronkright provides easy-to-understand research-based insights to develop equitable and just education systems that better meet school community needs. He has worked directly with stakeholders at all levels of the education system for nearly a decade, including board of education members, SEA staff members, state and district superintendents, and school faculty members.

He led K–12 research-practice partnerships to address complex, high-priority challenges in schools within the REL in Hawai’i, Palau, and the Federated States of Micronesia—and in the Central Plains states—through the CC program. Mr. Cronkright also served as the federal programs manager/academic officer for the Hawaii State Charter School Commission, as an elementary school principal, and as a high school vice principal in Michigan.

Tameka Porter – TA Provider and Content Expert: Oregon’s Multilingual Learner Reporting Guidance Project
Current Work and Evidence of Expertise

Dr. Tameka Porter is an expert in applying improvement science and implementation science to support SEAs in enhancing their educational systems, with a focus on improving outcomes for multilingual learners. She has a proven track record of leading intensive TA projects that use data to inform program design and implementation. Dr. Porter leverages improvement science cycles to measure effectiveness and refine interventions, ensuring continuous progress.

For example, in collaboration with the Hawai’i Department of Education and University of Hawai’i-Manoa, Dr. Porter developed data-driven strategies aligned with local practices focused on academic achievement for multilingual learners. This led to measurable gains in academic performance and postsecondary access for multilingual students. Dr. Porter fosters collaboration between state agencies, universities, and educators to implement evidence-based practices and improve educational opportunities for all students.

Obioma Okogbue – TA Provider and Content Expert: Idaho’s Teacher Mentoring Project
Current Work and Evidence of Expertise

Obioma Okogbue, M.Ed., M.A., is an experienced TA provider who partners with schools, districts, state education and health agencies, and community-based organizations to support their capacity-building and systems improvement efforts using an equity-centered approach. Ms. Okogbue serves as a project co-director and TA lead for the National Technical Assistance Center for the Education of Neglected or Delinquent Children & Youth, which provides direct assistance to states, schools, communities, and parents. Ms. Okogbue has also served as the subcontract project director and provided support for Child Trends’ work to support the Title IV, Part A TA center focused on student support and academic achievement. As part of the team, Ms. Okogbue was responsible for providing background information on the Center; analyzing and reporting needs assessment data; informing and developing TA products and training for Title IV, Part A state coordinators; and identifying resources and SMEs. Ms. Okogbue works with states across the country on implementing their federal programs and improving policies that impact the lives of children and youth and remains deeply connected to her TA clients and their communities.

Rebecca Jones – TA Provider and Content Expert: Alaska’s Addressing Educator Shortages Project

Current Work and Evidence of Expertise	<p>Rebecca Jones, M.A., is a TA specialist in youth development. She brings expertise in project management and qualitative and quantitative data collection and analysis, combined with practical experience working in the New York City Department of Education and as a classroom teacher in Tulsa, Oklahoma. Ms. Jones is currently the task lead for intensive TA support for the Chan Zuckerberg Initiative’s Innovation to Evidence portfolio. On this project, Ms. Jones manages all intensive and individualized technical support activities, including developing TA plans and coordinating staffing to meet grantees’ needs.</p> <p>Previously, Ms. Jones worked as a project manager at the New York City Department of Education. Her role combined project management and evaluation support for a cross-office team that provided tailored support to 247 schools and offered professional learning opportunities to all school staff in the city. Prior to that, she was a middle school math teacher in Oklahoma and supported new teacher training by observing and providing regular feedback to a cohort of new teachers.</p>
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Dr. Barbara Adams – Project Lead for Alaska’s Educator Shortages Project

Dr. Barbara Adams was selected for this role because of her experience providing intensive TA on this topic in Alaska.

Current Work	<p>Dr. Adams has facilitated, led, and managed various components of Alaska’s Teacher Retention and Recruitment (TRR) work since 2020. Recently, Dr. Adams produced Alaska’s TRR Playbook, a detailed document with strategies and support for implementing action plan recommendations organized by stakeholder groups (Alaska DEED, August 31, 2023). She accomplished this by compiling, organizing, and synthesizing all the work to date from the hundreds of stakeholders who participated. <i>Dr. Adams lives in Alaska.</i></p>
Past Roles and Contributions	<ul style="list-style-type: none"> • Dr. Adams has developed and conducted education research on a statewide and district level, provided evaluation services for a university STEM grant and a nationwide NASA grant. • She managed subcontracts with other evaluators to provide quantitative data analysis, supported a cohort of doctoral students in Guam in their work through the University of Alaska Fairbanks, and served as committee chair for a unique statewide legal settlement.
Evidence of Expertise	<p>She facilitated a working group that collaboratively created a TRR Action Plan, then authored the final document (Adams, 2021a). She also created and disseminated presentations, emails, and flyers to share the TRR Action Plan. After dissemination, Dr. Adams, provided intensive TA, managing the implementation phase by leading a team of facilitators who conducted regular small group meetings open to the public to generate deeper conversations on specific topics in the action plan and recommend implementation steps. Concurrently, Dr. Adams managed several contractors tasked with producing reports on related topics to compile options and details for practitioners.</p>

C2. TECHNICAL ASSISTANCE EXPERIENCE

This section describes the R11CC operating partners' additional TA expertise not already highlighted in the proposal, including additional past and current projects, as well as tools and resources we developed to facilitate, scale, and sustain the work.

EDNW, Child Trends, and FHI 360 have many recent and current TA and capacity-building projects in the priority areas of the Regional Center as well as across the five states. In addition to the examples throughout the proposal, table 12 outlines 14 projects that showcase the breadth of our partnership's recent work in Region 11 and across the focus areas. These projects illustrate work with various levels of the education system, stakeholders, and content areas.

Following the table are **detailed descriptions of three projects** that appear in table 12; these three projects provide evidence of our ability to design and implement capacity-building efforts and improve educational outcomes, particularly in Region 11 and for the most underserved schools and students: the Washington Statewide Family Engagement Center, Oregon's Multiyear Strategic Plan for Multilingual Learners, and the Montana Teacher Residency Demonstration Project. (See appendix I for descriptions of the remaining projects from table 12.) Next, we provide three examples of tool and resource development that demonstrate our ability to develop and deliver necessary supports to provide intensive TA.

Table 12. Selection of Region 11 Operating Partners' Technical Assistance Projects Aligned to Regional Center Priority Areas

Project Name and Description	Implement Consolidated State Plans	Implement, Scale Up, and Sustain Evidence-Based Programs and Practices							Address Educational Obstacles Faced by Underserved Children	Improve Implementation of ESEA Programs	Engagement and Communications
		Math	Literacy	Conditions to Accelerate Learning	Core Academic Instruction	Assessment	Educator Shortages	Aligned and Integrated Agency Systems			
EDNW											
Washington Professional Educator Collaborative							●	●			
Higher Education Coordinating Commission Community of Practice, OR							●	●			
DEED Science of Reading, AK			●			●					
The Math Innovation Zone, MT		●									
Washington Statewide Family Engagement Center								●	●		
Region 16 CC: Indigenous School Improvement Plans, WA	●								●	●	
Region 16 CC: Recruit, Prepare, and Retain Indigenous Educators, WA							●		●		
ODE Strategic Plan for Multilingual Learners, OR								●	●	●	
Cow Creek Band of Umpqua Tribe of Indians, OR					●				●		
Oregon’s Early Indicator and Intervention Systems (EIIS)				●					●		
Child Trends											
National Technical Assistance Center for the Education of Neglected or Delinquent Children & Youth									●		
National Early Care and Education Workforce Center									●		
FHI 360											
Office of Elementary and Secondary Education Innovation and Research TA & Dissemination Task Order											●
Summer Program Redesign				●							

Washington Statewide Family Engagement Center

In 2022, EDNW received a five-year federal contract to operate the Washington Statewide Family Engagement Center in



partnership with OSPI, Roots of Inclusion, Washington Family Engagement, and the Community Center for Education Results.²⁸ The Center aims to establish a collaborative infrastructure for family engagement across Washington; build educator and family capacity for effective and equitable family-school-community partnerships; and develop district and school capacity to identify, implement, and sustain evidence-based family engagement practices. District and school capacity-building efforts include online resources; opportunities to convene educators, families, and community partners; and intensive training and TA. The Center will serve approximately 1,094,330 students through statewide information and resources, as well as approximately 192 schools identified for comprehensive or targeted supports. Our team recently completed a statewide asset-mapping process, including a district survey, interviews, and focus groups that will provide critical information to guide regional communities of practice and TA. We are currently designing communities of practice for district leaders to assess current practices and create a vision and plan for embedding family engagement in their communities.

This project grew out of EDNW's successful partnership leading the Inclusionary Practices Family Engagement Collaborative alongside Roots of Inclusion and other community-based organizations in Washington. Our approach involves collaborating closely with community-based organizations to leverage their connections and insights from working with families and educators. Our culturally responsive approach aligns with Washington's framework

²⁸ <https://wafamilyengagement.org/>

of equity and shared responsibility as well as the Department of Education's equity framework. Our partnership model prioritizes meaningful engagement with families and educators to drive academic recovery and address students' developmental needs.

Oregon's Multiyear Strategic Plan for Multilingual Learners²⁹

EDNW collaborated with ODE to develop a multiyear strategic plan for multilingual learners in Oregon. We jointly created a blueprint for state action to enhance opportunities and outcomes for Oregon's diverse multilingual student population. EDNW leveraged existing relationships to collaborate with state-level agencies, LEAs, and community organizations to administer a statewide educator and administrator survey and host over 60 community outreach events that were attended by more than 400 individuals. We also analyzed secondary data and reviewed Oregon-specific initiatives and plans from other states. EDNW collaborated with a state-level workgroup of multilingual educational leaders and families to collectively analyze the data, make sense of the findings, and develop the strategic plan. The final plan outlined specific actions for the state and LEAs to improve family and community engagement, enhance systems of instruction and assessment, better prepare educators and

“The small group discussions, despite our diverse roles and positions within the education system, we share a common goal: to provide support to our MLL students. I appreciate the intentionality and richness of these conversations, and they make me excited for the next steps. Creating action and clear progress measures was a highlight as well. That takes the abstraction into practice”

“... being able to discuss as a group allowed for more clarity and reaffirms the group's shared goal and mission. I felt that our comments and suggestions were heard and appreciated.”

“Thank you for all your work on this strategic plan and for doing such a thorough job of gathering feedback from multiple stakeholders.”

– Oregon strategic plan stakeholder group participants

²⁹ More on EDNW's work to support multilingual learners: <https://educationnorthwest.org/areas-of-work/english-learners/cycles-of-improvement>

administrators to support multilingual learners, and expand pathways to multilingualism. We intentionally focused on groups of multilingual learners who need the most support, such as newcomers and English learners with disabilities. In addition, through close collaboration with state, regional, and local agencies, we aligned the actions with other state initiatives to set the plan up for successful implementation. Lastly, EDNW's partnerships with LEAs facilitated the translation of the plan into nine additional languages at no extra cost to the state. This allowed the plan to be more accessible to a wider range of community members. One project proposed for the R11CC Oregon service plan was informed by this effort.

Montana Teacher Residency Demonstration Project

Since 2021, the EDNW team operating Region 17 CC has partnered with Montana OPI to support the Montana Teacher Residency Demonstration Project, a teacher residency program designed to address the ongoing challenge of teacher recruitment and retention, particularly in rural communities. First, we convened a think tank of education leaders from Montana as well as representatives of successful teacher residency programs nationwide to guide OPI's design of the program. Since the residency launched, our team has helped OPI develop a plan and tools to evaluate the program for continuous improvement. In year 1, we led the evaluation while building OPI's capacity to implement and sustain the evaluation in future years.



The project has grown since its inception. In the 2022–23 school year, the residency operated in 10 districts with 17 residents; the following year, 23 residents served in 13 districts.

As of June 2024, 31 districts are scheduled to host residents for the upcoming school year.³⁰ In 2023, the state legislature passed HB 833 which established the program in state law and provides funds to support the program (Montana OPI, 2023). OPI is also interested in pursuing registered apprenticeship funds to support the program.

As previously discussed, in 2023 EDNW's communications team wrote and designed an impact story on the residency project.³¹ Later that year, our story was one of only three nationwide that the Best Practices Clearinghouse chose to highlight in a spotlight video.³²

Technical Assistance Tools and Resources

Our TA and capacity-building work has produced numerous tools, resources, and other materials that illustrate our research-based, systematic approach to collaborating with state, regional, local, and Tribal education agencies in key educational areas. These materials go through extensive development, feedback, and vetting processes. Once finalized, they serve as sustainability artifacts for TA recipients as well as resources to scale the work and inform the field. The three projects below offer examples of tools, resources, and other materials we developed through our TA and capacity-building efforts.

EDNW developed our Framework for Literacy Leadership Development to guide our literacy TA services delivered across the country. The framework is grounded in empirical research and specifically designed to address the implementation of literacy initiatives in



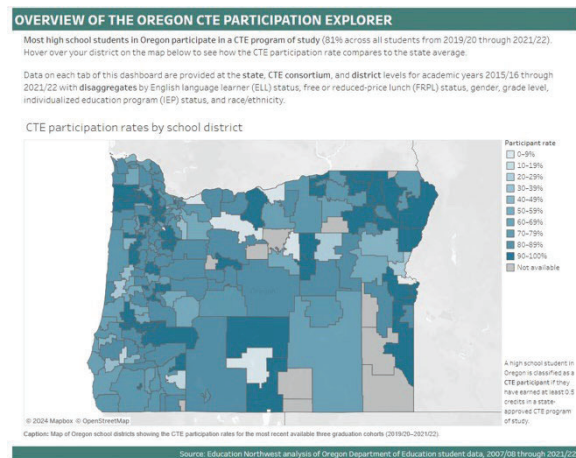
³⁰ https://universityofmontanawestern-my.sharepoint.com/:w:/g/personal/kirsten_minnick_umwestern_edu/ER193sz_epZJv-B5QCvxX3QBLJOXWtrtMcKUT9F4LmfdOQ

³¹ <https://reg17cc.educationnorthwest.org/sites/default/files/montana-workforce-redesign-508c.pdf>

³² https://bestpracticesclearinghouse.ed.gov/video/montana_teacher_residency_demonstration_project.html

diverse contexts. Our webpage on evidence-based literacy implementation includes detailed information about the framework and its use.³³ We used this framework to guide a successful statewide project with Alaska DEED³⁴ as well as an ongoing project with Baltimore City Public Schools.

ODE engaged EDNW to develop the Oregon CTE Participation Explorer, an interactive dashboard that allows users to explore CTE participation across the state, including disaggregating data by race, gender, English learner status, CTE cluster, and more. EDNW repurposed this tool for the Portland



Area CTE Consortium Equity Gap Analysis project, which builds the capacity of CTE leaders to identify and address equity gaps in student participation and persistence in CTE programming. We compiled individual district data profiles to allow district staff members to examine participation and persistence at their sites. Users can disaggregate data by student demographics and special population status to assess the extent to which students in their districts engage in CTE programming and identify equity gaps among different student groups.

When Astoria School District in Oregon developed its new strategic plan, district leaders knew equity must be a core component. **Astoria hired EDNW to conduct a districtwide equity review and use evidence to prioritize work on key focus areas using our Collaborative**

³³ <https://educationnorthwest.org/services/continuous-improvement/implementing-science-of-reading>

³⁴ <https://educationnorthwest.org/case-briefs/preparing-alaska-school-leaders-support-science-reading-implementation>

Analysis Process (CAP).³⁵ After initial data collection, EDNW guided the community in a CAP to make sense of the data. We packaged relevant data into three packets—aligned with three areas of the district’s strategic plan (i.e., instructional development and engagement, workforce, and relationship building)—then spent a full day working with 22 educators, parents, and students to analyze data, identify key findings, and lift up priority areas. To follow-up on the priorities, the district invited EDNW to provide two additional years of TA in the form of professional learning, communities of practice, and coaching. Together, we are building the district’s capacity to take ownership of community-identified goals and take concrete, strategic action toward equity.

The CAP engages community members in analyzing data to identify key findings and priorities. EDNW walks participants through the process of understanding data, validating individual findings, identifying key findings, and prioritizing key findings to act on. The process builds the district community’s capacity to work with data while recognizing the importance and value of community members’ lived experiences.

C3. DEVELOP NEW AND ONGOING PARTNERSHIPS

EDNW has cultivated our reputation and vastly grown our partnerships with leading experts nationally and regionally to enhance our TA supports. Section B4 highlights the partner types and specific partners we intend to engage nationally and locally in this work and includes evidence of our ability to do so. We commit to continually assessing the emerging needs in the region and pulling in partners and SMEs as the need arises. This section further demonstrates our approach and ability to develop partnerships that yield outcomes.

³⁵ A longer description of this project, including CAP, can be found in an EDNW Insights post: <https://educationnorthwest.org/insights/how-district-equity-review-united-community>

Approach

EDNW brings relationship expertise and technical capabilities and supports needed to develop new and ongoing partnerships. We engage partners by building authentic relationships: establishing trust; listening; co-developing projects and materials; clearly communicating needs, roles, and expectations; and generating buy-in. We ensure partners are a fit with us as well as our clients and recipients. We understand the importance of developing relationships with partners in decision-making roles and we have the technical capabilities and experiences co-creating memoranda of understanding, agendas, project plans, data-sharing agreements, work scopes, and contracts. Equally important, we use collaboration tools such as Microsoft Teams, SharePoint, and Zoom to co-create with partners. We set regular planning meetings and include partners in active planning and implementation tasks. We have established time-tested systems for managing work with multiple partners, subcontractors, activities, and timelines.

Region 11 Advisory Board Development: Partnering with *Clients and Experts*

The **advisory board** is an excellent vehicle to bring leading national and regional experts into the work. The advisory board will provide guidance for state-based and cross-state projects; advise on strategies to monitor and address the existing and evolving needs of students, families, and communities; ensure R11CC provides strong customer service and high-quality TA; and maintain our focus on achieving progress to improve student outcomes. We propose at least two virtual and one in-person advisory board meeting each year.

The board will consist of no more than 15 members, including chief state school officers and other SEA leaders from each state; Tribal and local education agencies; educators, students, and parents from urban and rural areas; business representatives; and **others with expertise using the results of research and evaluations**. We will collaborate with state chiefs (or assigned designees) to identify board members within the first month of funding.

From our experience operating CCs and REL Northwest, we know that SEA leaders' input on board members is essential: For a board to add value, chiefs must respect the members' input and members must know their input will be used. Members also must be deeply connected to and knowledgeable about the region. For example, we have secured a commitment from **researcher Gina Biancarosa** to serve on the board.³⁶ Dr. Biancarosa is the Ann Swindells Chair in Education and a professor in the University of Oregon's Department of Special Education and Clinical Sciences. Dr. Biancarosa has an established relationship with Alaska DEED: She is collaborating with DEED to develop a literacy screening for elementary school students learning Alaska Native languages.

³⁶ Resume can be found in the On-call SMEs Resume Attachment.

Demonstrated Ability

Our current partnerships reflect years of collaboration that are evident throughout the proposal, especially section B4. We also continue to build new relationships in the region. For example, we recently won a new NSF award to study basic needs of low-income STEM students in Washington. We build a partnership with the National League of Cities; Washington's Education Research and Data Center; Washington's Department of Social and Health Services; the State Board for Community and Technical Colleges; Washington Student Achievement Council; and colleges such as Everett Community College, Skagit Valley College, and Spokane Community College in order to create the network.³⁷ Additionally, EDNW is in the planning phase of a project to serve as Learning Network Manager for the Limitless Postsecondary Enrollment Learning Network beginning in November 2024. Funded by the Gates Foundation, this network connects 26 partnerships of K–12 districts, higher education institutions, and community-based organizations to increase postsecondary enrollment among underrepresented students in Washington. EDNW will maintain and enhance the established network to help reach the goal of 70 percent of Washington students enrolling in a postsecondary program after high school by 2035. Leveraging both EDNW's and the network's existing partnerships, EDNW will mobilize knowledge by identifying, sharing, and elevating learnings with funders and partners, with a goal to inform decision making toward more equitable outcomes. EDNW will design, oversee, and coordinate network activities while ensuring efficient communication among TA providers, the learning and improvement partners, and the 26 partnerships. These examples,

³⁷ https://www.nsf.gov/awardsearch/showAward?AWD_ID=2326042&HistoricalAwards=false

along with the partnership descriptions in B4, project descriptions in C2, and examples throughout the proposal provide indisputable evidence of our partnership capabilities.

CONCLUSION

Many organizations work in education reform across the Northwest, but none are as well suited to run the Region 11 Comprehensive Center as EDNW. For nearly six decades, EDNW has led equity-focused, evidence-based collaborative work in the region, with a track record of improving outcomes for the system and students. We refined our project design to reflect the best of old and new: our years of experience coupled with new approaches shared in this proposal. We bring operating partners new to the CC program who share our mindset and offer deep and diverse knowledge, relevant and recent experience in key priority areas, relationships, and lived experience in the region. Our overall team is unrivalled: Collectively, we are the best team for the proposed work. We are keenly aware of the need to embed CC work into larger initiatives for scale and sustainability. Our broad network of partnerships spans every state in the region and federal centers nationwide, which will bring additional insights, credibility, and guidance to projects and position them for success and scale-up. This work requires knowledge, technical skills, experience, and heart. We bring all of these to the table and would be honored to lead the R11CC in our home region.

APPENDIX A. FIVE-YEAR TIMELINE

	Year 1 (2024-25)				Year 2 (2025-26)				Year 3 (2026-27)				Year 4 (2027-28)				Year 5 (2028-29)			
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Regional Native Education Network																				
Interviews with state contacts																				
State teams form																				
MOU																				
Network kick-off meeting and begin to develop action plans																				
Individual state team intensive TA supports																				
Network meetings																				
If available, engage in NCC universal TA																				
Progress on state action plans																				
Reflect, revisit, continuous improvement of convening approach																				
Continuous improvement, scale, and sustainability of strategies in action plans																				
AK: Developing Skilled Lifelong Readers																				
Assemble partner groups																				
Develop purpose and meeting cadence																				
Gain shared understanding																				
Conduct gap analysis																				
Identify mechanism for “hub”																				
Create action plan																				
Identify, develop, organize, and disseminate evidence-based instructional strategies																				
Develop trainings																				
Develop literacy program monitoring tool																				

U.S. Department of Education | Comprehensive Centers Program (Region 11)

	Year 1 (2024-25)				Year 2 (2025-26)				Year 3 (2026-27)				Year 4 (2027-28)				Year 5 (2028-29)			
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Develop scale and sustainability plan																				
Ongoing implementation, continuous improvement, and sustainability																				
AK: Address Educator Shortages																				
Develop, implement, and support enhanced communication plan																				
Support district efforts to develop and implement local action plans																				
Create an implementation network																				
Local and state alignment and coherence planning																				
Support development of monitoring plan and process																				
Measure success																				
Develop plans for supporting scale, sustainability, and continuous improvement																				
ID: Teacher Mentoring																				
Conduct statewide scan																				
Identify and convene working group																				
Logic model training																				
Tools and resources development																				
ID: Continuous Improvement for Federal Programs Services																				
Develop and conduct training on logic models																				
Co-develop program-level logic models																				
Develop and conduct training on measurement and evaluation																				
Develop program-level measurement plans																				
Integrate evaluation findings																				

U.S. Department of Education | Comprehensive Centers Program (Region 11)

	Year 1 (2024-25)				Year 2 (2025-26)				Year 3 (2026-27)				Year 4 (2027-28)				Year 5 (2028-29)			
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Co-develop ongoing timeline and continuous improvement plan																				
MT: Learning Standards																				
Convene implementation team																				
Identify pilot school and develop readiness assessment																				
Develop foundation for professional learning																				
Develop and implement training tools for pilot schools																				
Design evaluation of standards implementation																				
Implement evaluation activities																				
Develop continuous improvement support plan																				
Design ongoing professional development for standards implementation																				
Implement standards implementation continuous improvement plan																				
MT: Comprehensive School Reform – More Rigorous Intervention																				
Assess state of school improvement efforts																				
Engage school partners in Circles of Reflection																				
Develop support materials																				
Co-develop implementation plan																				
Develop monitoring plan																				
Collect feedback from school partners																				
Implement feedback																				
Revise implementation and monitoring plans																				
Facilitate Circles of Reflection with newly identified schools																				

U.S. Department of Education | Comprehensive Centers Program (Region 11)

	Year 1 (2024-25)				Year 2 (2025-26)				Year 3 (2026-27)				Year 4 (2027-28)				Year 5 (2028-29)			
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
OR: Language Revitalization																				
Co-develop a summary of existing services																				
Develop communication plan and materials																				
Develop advisory council																				
Identify indicators of success and measurement strategies																				
Develop and facilitate communities of practice																				
Engage in continuous improvement																				
OR: Multilingual Learner Reporting Guidance																				
Conduct landscape scan																				
Co-develop essential questions																				
Audit of reporting indicators																				
Collaboratively implement data guidance																				
Support district monitoring																				
Co-develop data stories																				
Support working group meetings																				
Finalize and share data collection guidance																				
Establish communication groups																				
Refine guidance and tools																				
WA: Learning Standards																				
Develop shared understanding																				
Conduct data review and develop criteria for pilot schools																				
Develop readiness survey tool																				
Identify and map differences between sets of standards																				
Develop and synthesize practice profiles																				

U.S. Department of Education | Comprehensive Centers Program (Region 11)

	Year 1 (2024-25)				Year 2 (2025-26)				Year 3 (2026-27)				Year 4 (2027-28)				Year 5 (2028-29)			
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Develop fidelity tool for standards implementation																				
Develop communications and dissemination plan																				
Deliver training series for pilot participants																				
Gather feedback and revise training plan																				
Develop continuous improvement plan																				
Develop materials outlining standards implementation process																				
Implement evaluation																				
Implement revisions based on evaluation																				
Design ongoing professional development for standards implementation																				
Implement standards implementation continuous improvement plan																				
Develop revised continuous improvement plan for ongoing standards implementation																				
WA: Early Learning and Expansion of Transition to Kindergarten																				
Determine project priorities and implications																				
Define OSPI role once TK programs reach scale																				
Support development of vision for TK program																				
Create readiness assessment																				
Co-develop TK scaling up implementation plan																				
Conduct readiness assessment for OSPI and schools																				

U.S. Department of Education | Comprehensive Centers Program (Region 11)

	Year 1 (2024-25)				Year 2 (2025-26)				Year 3 (2026-27)				Year 4 (2027-28)				Year 5 (2028-29)			
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Co-develop a TK implementation guide for districts and schools																				
Develop monitoring tool																				
Develop a communication and dissemination plan																				
Co-design district and regional cohort support																				
Revise implementation plan, support materials, and communication plan in response to readiness assessment																				
Conduct statewide listening sessions																				
Finalize 2024-2025 scale-up plan																				
Develop professional learning in support of TK plan																				
Organize and facilitate professional learning conference focused on TK program implementation																				
Facilitate district and regional cohort support																				
Design evaluation plan for TK program implementation																				
Collect data for evaluation plan																				
Continued facilitation of regional cohort support																				
Analyze evaluation data and produce report																				
Revise professional learning plans and materials because of evaluation																				
Revise scale-up plan to work toward sustainability																				
Revise evaluation plan																				
Continue to provide professional learning to TK program implementers																				
Project Management																				
Negotiating Annual Service Plan																				

U.S. Department of Education | Comprehensive Centers Program (Region 11)

	Year 1 (2024-25)				Year 2 (2025-26)				Year 3 (2026-27)				Year 4 (2027-28)				Year 5 (2028-29)			
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Reporting: Progress Reporting (monthly)																				
Reporting: Annual Performance Report																				
Performance Management Meeting: Center Management Meetings																				
Performance Management Meeting: Data and Evaluation Meetings																				
Performance Management Meeting: State Team Meetings																				
Performance Management Meeting: Project Update Meetings																				
Performance Management Meeting: Project Review Meetings																				
Performance Management Meeting: Annual Planning and Reflection Meeting																				
Performance Management: Advisory Board Meetings																				
Evaluation: Capacity Building Planning and Assessment Tool																				
Evaluation: Client Surveys																				
Evaluation: Recipient Surveys																				
Evaluation: Surveys and Products Feedback Surveys (ongoing)																				
Evaluation: Artifacts and Existing Data (ongoing)																				
Evaluation: Website Analytics (ongoing)																				
Evaluation: Project Specific Measures (ongoing)																				
Evaluation: SEA Leadership Feedback (ongoing)																				
Stakeholder Engagement: Project Specific Stakeholder Planning (takes																				

U.S. Department of Education | Comprehensive Centers Program (Region 11)

	Year 1 (2024-25)				Year 2 (2025-26)				Year 3 (2026-27)				Year 4 (2027-28)				Year 5 (2028-29)			
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
place during existing project update meetings)																				
Stakeholder Engagement: Advisory Board Input (takes place during existing Advisory Board meetings two times per year)																				
Stakeholder Engagement: Listening Sessions																				
Stakeholder Engagement: Create and Manage Online Communities (ongoing)																				
Stakeholder Engagement: Push Text Input and Feedback Forms (ongoing)																				
Collaborate/Joint Needs Sensing with RELNW																				

APPENDIX B. REGION 11 ORGANIZATIONAL CHART ROLE DESCRIPTIONS

The **Center leadership team** is responsible for overall project strategy, implementation, and management. We propose a co-director model, with each .58 FTE EDNW co-director conducting internal and external project strategy, implementation, and overall management; serving as a liaison for key state leaders and overseeing project work in those states; and providing assurance of overall quality and client/partner satisfaction. From our work with these states, we have learned that this direct connection with Center leadership is critical. The project manager will lead project and budget management and reporting, as well as manage logistics related to staffing, onboarding, and subcontractor and SME management.

Project leads will manage the intensive TA projects including working directly with state, local, regional, and Tribal education agencies as well as other clients and recipients; engaging SMEs; and assuring outcomes are achieved. The leads will report directly to Center directors, ensuring they have access to leadership for collaborative problem-solving.

Stakeholder engagement, needs sensing, and communications leads will support engagement, needs sensing, and dissemination of resources and findings with relevant regional and national stakeholders through R11CC and National CC networks. This includes working closely with the evaluation team and REL Northwest on needs sensing and data collection. Communications activities include maintaining a user-friendly website and a presence on LinkedIn, X, and other emerging media outlets. We intend to maintain our current position in the National CC communications workgroup to leverage the knowledge and network of the CC program, enhancing our ability to efficiently and effectively disseminate information.

The **quality assurance lead** is responsible for overall quality and client and recipient satisfaction. This role will lead quarterly project reviews with project leads to assess quality, timeliness, budget, staffing, and potential risks so we can catch issues before they escalate.

The **evaluation team** will conduct continuous improvement and evaluation work (see Performance Management and Evaluation Plan section) including ongoing collection of project performance data from client and recipient partners and coordination with the national evaluation team and stakeholder engagement team.

We will establish an **advisory board** to provide guidance for state-based and cross-state projects; advise on strategies to monitor and address the existing and evolving needs of students, families, and communities; ensure R11CC provides strong customer service and high-quality TA; and maintain our focus on achieving progress to improve student outcomes. We propose at least two virtual and one in-person advisory board meeting each year. The board will consist of no more than 15 members, including chief state school officers and other SEA leaders from each state; Tribal and local education agencies; educators, students, and parents from urban and rural areas; business representatives; and others with expertise using the results of research and evaluations. We will collaborate with Region 11 state chiefs (or assigned designees) to identify board members within the first month of funding. From our experience operating CCs and REL Northwest, we know that SEA leaders' input on board members is essential: For a board to add value, chiefs must respect the members' input and members must know their input will be used. Members also must be deeply connected to and knowledgeable about the region. For example, we have secured a commitment from **researcher Gina Biancarosa** to serve on the board.³⁸ Dr. Biancarosa is the Ann Swindells Chair in Education and a professor in the University of

³⁸ Resume can be found in the On-call SMEs Resume Attachment.

Oregon's Department of Special Education and Clinical Sciences. Dr. Biancarosa has an established relationship with Alaska DEED: She is collaborating with DEED to develop a literacy screening for elementary school students learning Alaska Native languages.

APPENDIX C. DEFINED PROGRAM PERFORMANCE MEASURES

Measures that were derived from the national Evaluation Working Group under the current funding cycle (Region 17 CC) are labeled as “Federal performance measures” below.

Measures that were created specifically to assess Region 11’s outcomes are labeled as “Program-specific performance measures” below.

1. Performance measure 1 (also known as GPRA 1): Region 11 clients and recipients are satisfied with the quality, usefulness, and relevance of services provided.
 - a. Region 11 technical assistance (TA) services are considered **high quality** by its stakeholders, as indicated by the percentage of clients who rate the TA services as high quality (Federal performance measure).
 - b. Region 11 TA services are considered **useful** by its stakeholders, as indicated by the percentage of clients who rate the TA services as useful (Federal performance measure).
 - c. Region 11 TA services are considered **relevant** by its stakeholders, as indicated by the percentage of clients who rate the TA services as relevant (Federal performance measure).
 - d. Percent of TA recipients reporting satisfaction with the **quality** of the services provided (Program-specific performance measure).
 - e. Percent of TA recipients reporting satisfaction with the **usefulness** of the services provided (Program-specific performance measure).
 - f. Percent of TA recipients reporting satisfaction with the **relevance** of the services provided (Program-specific performance measure).
 - g. Region 11 clients and recipients have **trusting and supportive relationships** with R11CC and its project partners (Program-specific performance measure).
2. Performance measure 2 (GPRA 2): R11CC provides services and products to a wide range of clients and recipients.
 - a. Number of recipient groups to which services and products were provided (Federal performance measure).
 - b. Region 11 events provide services and products to a **large number of recipients**, as indicated by the number of recipients served (Program-specific performance measure).
 - c. Region 11 TA services **reaches a large audience** as indicated by the sum of: (a) the monthly average number of newsletter subscribers; and (b) the monthly average number of Twitter followers (Program-specific performance measure).
 - d. R11CC uses a **two-way system of communication** with clients and recipients to disseminate services, tools, and products. (Program-specific performance measure)
3. Performance measure 3 (GPRA 3): R11CC demonstrates that capacity-building services were implemented as intended.
 - a. Projects achieve their **intended milestones**, as indicated by the percentage of milestones achieved during each reporting period (Federal performance measure).
 - b. Projects achieve their **intended outputs**, as indicated by the percentage of outputs achieved during each reporting period (Federal performance measure).
 - c. Percent of key clients reporting R17CC capacity building services are based on **high priority needs** (Federal performance measure).
 - d. Percent of key clients reporting R17CC capacity building services are **delivered as agreed upon** (Federal performance measure).

- e. Percent of key clients reporting the R17CC's approach to capacity building services is **personalized to address the identified needs** (Federal performance measure).
 - f. Percent of key clients reporting R17CC capacity building services are **aligned to the strategic plan** or ESSA goals (Federal performance measure).
 - g. Percent of key clients reporting that R17CC capacity building services are **evidence-based** (Federal performance measure).
 - h. Percent of key clients reporting that R17CC capacity building services are consistently **delivered in a timely manner** (Federal performance measure).
 - i. Percent of key clients reporting that the R17CC works in a **collaborative manner** (Federal performance measure).
 - j. Percent of key clients reporting that the R17CC works in a manner that fosters a **trusting relationship** (Federal performance measure).
 - k. Percent of key clients reporting that R17CC staff who deliver capacity building services have the **necessary knowledge and skills** (Federal performance measure).
 - l. Region 17 stakeholders report satisfaction with the extent to which capacity-building services were **implemented as intended**, as indicated by the percentage of stakeholders who report being satisfied that TA services were implemented as intended (Program-specific performance measure).
 - m. SEA and Region 17 **co-develop state and regional work plans**, as indicated by the number of project plans developed (Program-specific performance measure).
 - n. SEAs and LEAs engage in **learning about evidence-based practices and processes** for supporting continuous improvement, as indicated by the percentage of stakeholders who report that they believe they are learning about evidence-based practices and processes (Program-specific performance measure).
 - o. Region 11 clients demonstrate **new or increased knowledge and skills** (human capacity) (Program-specific performance measure).
 - p. Region 11 capacity-building services support the **creation of structures and systems** that are evidence-based, compliant, and culturally responsive (organizational capacity) (Program-specific performance measure).
 - q. Region 11 capacity-building services result in **services, tools, and products** that engage target recipients and enhance further awareness of the Comprehensive Center (resource capacity) (Program-specific performance measure).
 - r. Region 11 capacity-building services support the **implementation of policies necessary for equity and school improvement** (policy capacity) (Program-specific performance measure).
 - s. R11CC supports its clients in achieving **improved recruitment, support, and retention** of effective educators (Program-specific performance measure).
 - t. R11CC supports its clients in **adopting approaches designed to enhance learning** for underserved and highest-need student populations (Program-specific performance measure).
4. Performance measure 4 (GPRA 4): R11CC demonstrates that recipient outcomes were met.
- a. Percent of **short-term outcomes met** (Federal performance measure).
 - b. Percent of **medium-term outcomes met** (Federal performance measure).
 - c. Percent of **long-term outcomes met** (Federal performance measure).
 - d. Percent of key clients reporting a **gain in new knowledge or skills** (Federal performance measure).
 - e. Percent of key clients reporting **use of new knowledge or skills** to carry out the work of this project (Federal performance measure).
 - f. Percent of key clients reporting improved understanding of organizational structures and functions (Federal performance measure).
 - g. Percent of key clients reporting **improvement in organizational structures and functions** (Federal performance measure).

- h.** Percent of key clients reporting **improved understanding in how to align or enact policies** (federal, state, local) (Federal performance measure).
- i.** Percent of key clients reporting **improved alignment or enactment of policies** (federal, state, local) (Federal performance measure).
- j.** Percent of key clients reporting **increased understanding of how to secure, align, or use resources** (e.g., staffing, funding, facilities, equipment, technology, materials) (Federal performance measure).
- k.** Percent of key clients reporting **improvement in securing, aligning, or using resources** (e.g., staffing, funding, facilities, equipment, technology, materials) (Federal performance measure).
- l.** Region 11 clients achieve **consistent improvements in human, resource, organizational, and policy capacity** over the life of the project (Program-specific performance measure).
- m.** Region 11 clients demonstrate the **willingness and capacity to scale and/or sustain** the program, policy, educator, and student outcomes achieved during the project (Program-specific performance measure).

APPENDIX D. SAMPLE INSTRUMENT – SEA SURVEY

SEA/LEA LEADERSHIP SURVEY

Concord Evaluation Group is an independent evaluator responsible for evaluating the technical assistance services provided to you by the Region 17 Comprehensive Center (R17CC) staff. This survey asks about the technical assistance services you have received since October 1, 2023.

Although participating in this survey is very important, your participation is voluntary. We anticipate no risks to your participation, nor will there be any repercussions for you if you choose not to participate. While we do not anticipate any specific benefits, we do think Comprehensive Center will benefit from your feedback. You can skip any questions that you do not wish to answer. Your feedback will help shape the services you receive through the comprehensive center. The data will not be used for purposes other than the evaluation. If you have any questions or concerns about the survey, please contact Dr. Christine Andrews, Region 17 CC Evaluator, at (978) 369-3519 or christine@concordevaluation.com.

While the survey is not confidential, your name will not be used on any reports or presentation of results. The survey responses will be stored on a secure folder that is only accessible by the CC evaluation team.

We appreciate your time!

- Name:

Do you consent to participate in the survey? (this will include survey logic. If they do not consent, then they will be directed to the end of the survey thank you page)

- Yes
- No

- Which project are you providing feedback on (Please complete one survey per project)?

[High Quality, Useful, and Relevant Technical Assistance: GPRA 1]

[For the next three questions, each item will use a 5-point response scale: 1 = Strongly disagree, 2 = Disagree, 3 = Neither agree nor disagree, 4 = Agree, 5 = Strongly agree.]

Please tell us how much you agree or disagree with each of the following statements:

- I am satisfied with the **quality** of capacity-building services provided by R17CC.
- I am satisfied with the **usefulness** of capacity-building services provided by R17CC.
- I am satisfied with the **relevance** of capacity-building services provided by R17CC.

[Audiences Reached: GPRA 2]

- Has there been any change in the **number** of recipients in your state or district who receive R17CC services and products?
 - a. No change [skip next question]
 - b. Yes, fewer people are receiving services/products

- c. Yes, more people are receiving services/products
- (If Yes) Please explain:

[Fidelity: GPRA 3]

- Have you worked with R17CC to develop a **state plan**?
 - a. No [skip next item]
 - b. Yes
- (If Yes) Is this plan updated regularly to your satisfaction?
 - a. No
 - b. Somewhat
 - c. Yes

[For the next set of questions, each item will use a 5-point response scale: 1 = Strongly disagree, 2 = Disagree, 3 = Neither disagree nor agree, 4 = Agree, 5 = Strongly agree, plus I don't know.]

Please tell us how much you agree or disagree with each of the following statements:

- The R17CC's capacity building services are based on high priority needs.
- The R17CC's capacity building services are delivered as agreed upon.
- The R17CC's approach to capacity building services is personalized to address identified needs.
- The R17CC's capacity building services are aligned to the strategic plan or ESSA goals.
- The R17CC provides capacity building services that are evidence-based.
- The R17CC consistently delivers capacity building services in a timely manner.
- The R17CC works with the state in a collaborative manner.
- The R17CC works with the state in a manner that fosters a trusting relationship.
- The R17CC staff who deliver capacity building services to the state have the necessary knowledge and skills.

[Outcomes: GPRA 4]

[For the next set of questions, each item will use a 5-point response scale: 1 = Not at all, 2 = A little, 3 = Somewhat, 4 = A moderate extent, 5 = A great extent, plus I don't know.]

To what extent has the R17CC project helped you or anyone else on your project team:

[Note: Each of these is optional]

- Gain new knowledge or skills.
- Use new knowledge or skills to carry out the work of this project.
- Improve understanding of organizational structures and functions.
- Improve organizational structures and functions.
- Improve understanding of how to align or enact policies (federal, state, local).
- Align or enact policies (federal, state, local).
- Improve understanding of how to secure, align, or use resources (e.g., staffing, funding, facilities, equipment, technology, materials).
- Secure, align, or use resources (e.g., staffing, funding, facilities, equipment, technology, materials).
- In what ways has R17CC helped **build the capacity** of your SEA to carry out this project:
- What aspects of the partnership have been challenging and could be further improved:

Project-Specific Outcomes Questions [Respondents will only see questions related to their specific project] TBD

APPENDIX E. SAMPLE INSTRUMENT – BASELINE CAPACITY PLANNING TOOL**REGION 17 COMPREHENSIVE CENTER CAPACITY BUILDING PLANNING TOOL**

[The project lead will complete this form with input from the SEA client so that they can explain and define all the terms contained here and develop a shared understanding.]

- What is the goal of your proposed project? (Free response)
- In the next twelve months, which of the following best describes the outcomes you hope to achieve?
- **Developmental outcomes.** Improvement of a skill or process.
- **Transitional outcomes.** Initiation of a change in current organizational structures and processes from its initial state to a new desired state.
- **Transformational.** Outcomes are achieved and a shift in culture and beliefs within the organization that will result in significant differences in organizational structures and processes.
- Select which of the following areas of capacity are essential for the focus of the project: (Select all that apply)
- Knowledge utilization, which includes:
 - Engaging, managing and developing staff to utilize full potential in alignment with the mission.
 - Assessing workforce capability and capacity needs to support high performance.
 - Ensuring individuals have the content knowledge and skills to do what is being asked.
- Communication and collaboration, which includes:
 - Determining requirements, needs, expectations, and preferences of partners/stakeholders.
 - Building relationships with partners/stakeholders to ensure partner satisfaction and organizational sustainability.
- Leadership operation, which includes:
 - Guiding and sustaining the project
- Organizational operation, which includes:
 - Developing strategic objectives and action plans.
 - Deploying action plans and making adjustments as needed.
 - Designing, managing, improving, and sustaining key work processes.
- Data use, which includes:
 - Selecting, gathering, analyzing, managing, and improving data, information, and knowledge assets.
 - Managing information technology.
 - Assessing results and using information to improve performance.
- For each of the capacity areas you identified, which of the following do you believe should be the focus? (Select all that apply)

Capacity Areas	Capacity Focus			
	Human Capacity	Organizational Capacity	Policy Capacity	Resource Capacity
Knowledge utilization	Yes/No	Yes/No	Yes/No	Yes/No
Communication and collaboration	Yes/No	Yes/No	Yes/No	Yes/No
Leadership operation	Yes/No	Yes/No	Yes/No	Yes/No
Organizational operation	Yes/No	Yes/No	Yes/No	Yes/No
Data use	Yes/No	Yes/No	Yes/No	Yes/No

Definitions

Human Capacity: development or improvement of individual and collective knowledge, skills, technical expertise, and ability to adapt and be resilient to policy and leadership changes.

Organizational Capacity: agency's structures that support clear communication and a shared understanding of its visions and goals, and delineated individual roles and responsibilities in functional areas.

Policy Capacity: structures that support alignment, differentiation, or enactment of local, State, and Federal policies and initiatives.

Resource Capacity: tangible materials and assets that support alignment and use of Federal, State, private, and local funds.

- For the capacity areas and foci selected above, identify your perceived *current* level of capacity on a scale of 1 to 4 (1 = Low, 2 = Basic, 3 = Moderate, 4 = Strong):

Capacity Areas	Capacity Focus			
	Human Capacity	Organizational Capacity	Policy Capacity	Resource Capacity
Knowledge utilization	1, 2, 3, 4	1, 2, 3, 4	1, 2, 3, 4	1, 2, 3, 4
Communication and collaboration	1, 2, 3, 4	1, 2, 3, 4	1, 2, 3, 4	1, 2, 3, 4
Leadership operation	1, 2, 3, 4	1, 2, 3, 4	1, 2, 3, 4	1, 2, 3, 4
Organizational operation	1, 2, 3, 4	1, 2, 3, 4	1, 2, 3, 4	1, 2, 3, 4
Data use	1, 2, 3, 4	1, 2, 3, 4	1, 2, 3, 4	1, 2, 3, 4

- For the proposed project, at which stage of implementation do you believe you are currently at?
[Project leads: Explain these stages as needed]
- **Exploration:** In this stage, key actors identify the need for change; determine the desired capacity; and identify the knowledge, skills, structures, and processes that need to be in place to achieve the desired capacity. An important task during this stage is to evaluate the current capacity of the organization, possibly including staff skills, number of staff, computer and other systems, infrastructure, and other resources. The “capacity gap” is the difference between existing capacity and needed capacity.
- **Emerging Implementation:** This stage can be summarized in three steps: (1) the target organization’s employees participate in activities; (2) the employees build new knowledge, update technological or physical infrastructure, increase resources, or learn to use available resources more efficiently; and (3) the employees apply their new knowledge and utilize new systems.
- **Full Implementation:** This stage involves the integration of the new information and new skills and the refining of practices based on evaluation of the changes. During this stage, evaluations of the capacity building activities can help to inform key actors on the innovation’s impact and consequences. At this stage, TA providers may need to modify their TA approach, or changes may need to be made to the focus of capacity building activities to fully effect desired changes.
- **Sustainability:** This final stage involves “pervasive and consistent” use of the refined skills and practices. Also, the organization demonstrates the capacity and ability to analyze and modify practices for continuous improvement and for any needed refinement of the innovation.

APPENDIX F. EVALUATION PLAN DATA COLLECTION SOURCES

- **Monthly progress report (monthly report).** An internal monthly report described in more detail in the management systems and tools section will collect data from R11CC project leads about all TA services.
- **Client surveys.** We will conduct semi-annual web-based surveys of SEA and LEA clients who participate in TA services provided by R11CC.
- **Recipient surveys.** We will conduct semi-annual web-based surveys of TA recipients (not including key SEA or LEA leads who participate in client surveys).
- **Services and products feedback survey.** The internal evaluator will work with each project lead to develop and administer a services and products feedback survey following delivery of each service or product. The services and products feedback survey will provide data to measure progress on performance measures 1-4.
- **Artifacts and existing data.** The external evaluator will work with project leads and TA teams to determine existing project-level data and artifacts, such as planning documents, reports, or revised state standards.
- **Website analytics.** We will collect website analytics over the course of the contract to determine the average number of visits per month to the R11CC website, average time spent on the website per visit, and the most downloaded files/most visited pages.
- **Site visits (including on-site observations and interviews/focus groups).** Annually, and when there are observable services, events, or activities, the external evaluator will conduct an in-person site visit. Site visits will include observations, interviews, and/or focus groups with TA recipients. The observations will use a running record protocol (rather than a prescribed set of predetermined codes) to record detailed notes of observable behaviors and verbalizations, which will later be analyzed for themes and actionable takeaways.
- **Other project-specific measures.** As needed, the external evaluator will work with project leads to track findings from project-specific measures used to track progress on performance measures 3 and 4.

APPENDIX G. SAMPLE REPORT



REGION 17 COMPREHENSIVE CENTER

Year 4 Annual Evaluation Report

October 1, 2022–September 30, 2023

Submitted to:

Office of Elementary and Secondary Education, U.S. Department of Education, Washington, DC
Christine Andrews, Ph.D. (External Evaluator) | *Concord Evaluation Group*
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December 2023



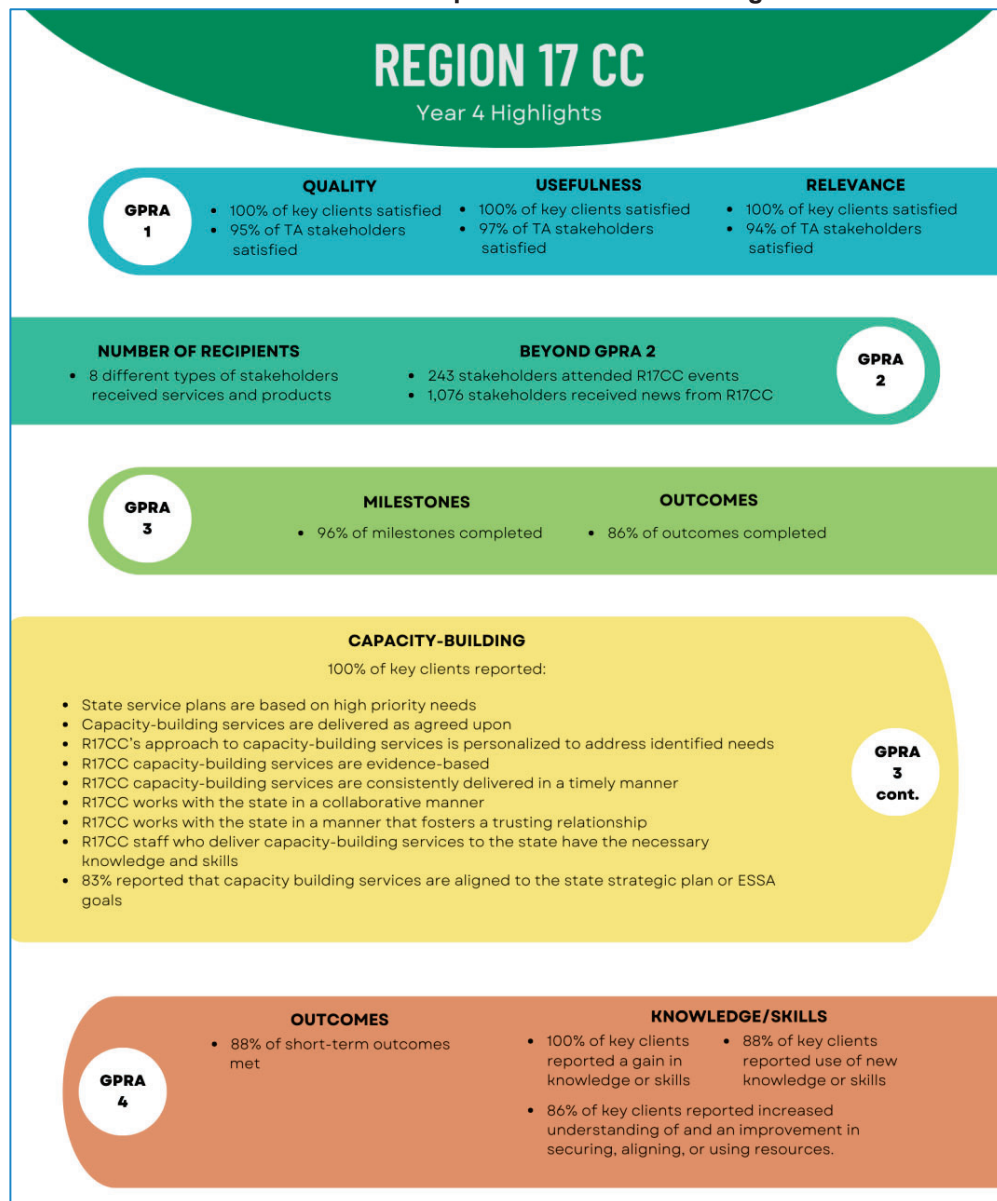
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Section 1: Executive Summary

Overall, Year 4 was a success for the Region 17 Comprehensive Center (R17CC). Major findings are summarized below.

Table 1: Year 4 top-level evaluation findings



Both Idaho and Montana experienced unprecedented upheaval and staff turnover this year, so we recommend R17CC continue to collaborate closely with the states and to support them during these transitions. Year 5 will hopefully bring stability so the states can focus on impacts.

Section 2: Outcomes of Service Delivery

2.1 Performance Measure Indicators (Including GPRA)

Education Northwest (EdNW) operates the Region 17 Comprehensive Center (R17CC) for the Office of Elementary and Secondary Education in the U.S. Department of Education. From October 2022 through September 2023, R17CC staff members provided technical assistance (TA) and support to the Idaho State Department of Education (ISDE) and the Montana Office of Public Instruction (OPI). Starting in 2019, R17CC staff members provided three tiers of capacity-building TA (intensive, targeted, and universal) to support client readiness to implement evidence-based practices and use data to inform decision-making processes.

This Year 4 report contains evaluation data for nine projects that R17CC supported in 2022–23, including two intensive, six targeted, and one universal project. The projects include:

Intensive Projects

- Progress monitoring for IDSE programs
- State standards revision

Targeted Projects

- NW RISE: A rural collaborative
- Educator workforce redesign
- Implementing a through-year assessment system in Montana
- Trauma-informed professional development (PD)
- Mentoring for education professionals
- Idaho statewide assessment

Universal Projects

- National collaboration

Appendix A provides a more detailed description of each of these projects. R17CC staff members provided *direct* TA to stakeholders for each of these projects. R17CC staff members also co-developed logic models for each project to support and guide the SEA clients' work (Appendix B). Additionally, R17CC staff members provided *indirect* TA by disseminating materials and information to stakeholders through the R17CC website, e-newsletters, and Twitter; responding to information search requests; and disseminating resources in conjunction with R17CC TA activities.

To assess performance on a set of key indicators, R17CC partnered with an independent, external evaluator from Concord Evaluation Group (CEG) and an independent, internal evaluator at Education Northwest. Independently, the evaluators provided formative and summative evaluation support to help R17CC staff members use data and evidence in their

ongoing work. The external evaluator also ensured that R17CC provided objective reporting on progress toward performance measures and outcomes to the U.S. Department of Education. Progress was assessed against the five objectives below:

1. R17CC clients are satisfied with the quality, usefulness, and relevance of services provided (GPRA 1).
2. R17CC provides services and products to a wide range of recipients (GPRA 2).
3. R17CC demonstrates that capacity-building services were implemented as intended (GPRA 3).
4. R17CC demonstrates that recipient outcomes were met (GPRA 4).
5. R17CC consults and collaborates with others (Program-level).

The evaluators also tracked a set of project-level measures for intensive and targeted projects. The R17CC evaluation plan, including project-specific measures, was updated for Year 4 and is included in Appendix C. The plan describes the performance measures that are assessed for each objective and under each tier of capacity-building TA, as well as the indicators, data sources, and timing of data collection for operationalizing progress toward the performance measures. It also includes a list of indicators used to measure progress toward achieving each of the objectives. Mixed methods are used to address the formative and summative components of the evaluation through the collection of quantitative and qualitative data.

2.2 Reflections on Year 4 Challenges

Both states experienced turnover in Year 4. In Montana, several key leaders who were highly involved in CC work left the agency. In Idaho, there was a change in administration in January 2023, and several staff members left both before and after the new chief took office. Both types of turnover had different impacts on R17CC's work. In Idaho, the new leadership wanted to reset all projects after reviewing what the previous administration was working on. In Montana, the turnover meant that the R17CC team helped to onboard new staff members to existing projects. In all cases, a focus on documentation and communication has been key. Onboarding staff in Montana took time, but the documentation the R17CC kept throughout the process supported the projects well, and onboarding was smooth.

2.3 Capacity-Building

Despite the challenges experienced in Year 4, the evaluation data provided evidence that the R17CC TA services and products continued to support improvements within the capacity-building dimensions. In addition to the GPRA measures and the program-level measures summarized below and in Appendix H, data collected to assess progress toward project-specific outcomes (Appendix I) also indicated that progress was made with respect to capacity-building.

In Year 4, the R17CC projects demonstrated an improvement over performance in Year 3 and met all of its capacity-building targets (GPRA 3). Specifically, 100% of SEA leads reported that R17CC capacity-building services are based on high priority needs, are delivered as agreed upon, are personalized to address identified needs, are evidence-based and are delivered in a

timely manner. Those same leads also reported that the R17CC works with the state in a collaborative manner and in a manner that fosters a trusting relationship, and that the R17CC staff who deliver capacity-building services to the state have the necessary knowledge and skills. Eighty-three percent reported that the services are aligned to the state strategic plan or ESSA goals.

One SEA lead reported that they appreciated that “R17CC provides surveys to gather feedback from events based on professional learning. They also use the data gathered to provide high-level reports.” Another reported, “The R17CC team was a tremendous help to support our team with internal item review for our through-year assessment. They join us for weekly team meetings with our testing vendor and help us prepare for these meetings. R17CC supported our agency with item review. They provide high-level support and insight for our team that no one in our agency is able to provide.”

All nine of the projects (100%) had worked with R17CC to develop work plans in Year 4. Moreover, 93% of TA recipients who attended project events reported that they have been learning about evidence-based processes for supporting continuous improvement through events hosted by the R17CC and 88% reported satisfaction with the extent to which capacity-building services were implemented as intended, as indicated by the percentage who reported that TA objectives were met in the events they attended.

During the reporting period, the R17CC exceeded all of its outcome targets related to capacity-building (GPRA 4). Specifically, 100% reported a gain in new knowledge or skills; 88% reported the use of new knowledge or skills; 86% reported having an increased understanding of how to secure, align, and use local, state, and federal funds; and 86% reported actually doing so.

2.4 Overall Impact

As summarized in the updated 524B tables in Appendix H and the project-specific outcomes summarized in Appendix I, evaluation data collected in Year 4 provided evidence that the R17CC’s work was high quality, useful, and relevant to its key clients and stakeholders (GPRA 1). Nearly all (95%) of TA recipients reported that the services were high-quality while 100% of key clients reported the same. Likewise, 97% of TA recipients reported that the services were useful, while 100% of key clients reported the same. Ninety-four percent of TA recipients reported the services were relevant, while 100% of key clients reported the same. Last year, we observed differences in satisfaction between TA recipients and key clients that were due to ongoing changes at the state level and specific challenges experienced on the projects. The R17CC immediately addressed any concerns last year to mitigate the challenges. The evidence collected in Year 4 provides evidence that the mitigation efforts were successful.

The R17CC exceeded its targets related to GPRA 2 in Year 4. The center provided services and products to a large number of event attendees. The R17CC also reached a large audience with its universal TA services via its newsletter, Twitter, and website. The number of types of recipients far exceeded the GPRA 2 target of at least three groups: in Year 4, R17CC provided services to eight different types of recipients (the target was three).

When asked about whether there had been a change in the number of people or groups served by the R17CC TA services, all of the SEA leads (100%) reported that there had not been any changes.

With respect to completing milestones and outputs (GPRA 3), the R17CC exceeded both of its targets in Year 4: 96% of milestones were completed and 86% of outputs were completed across the nine projects.

In terms of achieving its short-term outcomes, the R17CC exceeded its target of 75% when 88% of the short-term outcomes were achieved in Year 4.

Within specific projects, the project-specific outcomes data (Appendix I) also offered evidence of positive overall impact. In particular:

- OPI leadership reported having an understanding of program evaluation components including surveys and interviews.
- OPI leadership reported having the capacity to implement program evaluation components including surveys and interviews.
- OPI leadership reported satisfaction with the developed processes and protocols for the state standards revision project.
- OPI leadership reported increased knowledge of best practices for soliciting actionable public feedback.
- OPI leadership reported that they had implemented stakeholder feedback to align newly-developed test items to local contexts.
- OPI leadership reported having a deeper understanding now of evidence around using through-year assessments as summative assessments.

Two outcomes that were not achieved yet were:

- OPI leadership was neutral about whether they had an increased knowledge of best practices for group facilitation yet.
- OPI leadership was neutral about plans for professional development to build data literacy for use of assessment data to inform instruction.

2.5 Sustainable Change

To ensure that the work being done leads to long-term, sustainable change, R17CC uses a continuous improvement process driven by data and the use of evidence.¹ In each of R17CC's projects, leads first engage with the stakeholders to identify data that indicate an area of focus. Once this focus is identified, project plans are developed and then updated and refined using

¹ SPUR = Set the focus, Plan for change, Undertake change, Reflect and recharge

the continuous improvement process. In addition to engaging in regular discussions with stakeholders to gauge satisfaction, R17CC relies on data for continuous improvement of its service quality through leadership surveys (Appendix D), TA participant surveys (Appendix E), and monthly project reports (Appendix F), which are collected and synthesized by the external evaluator at CEG. In addition, R17CC relies on event surveys administered at all R17CC events by the internal evaluator (Appendix G). After each round of data collection, the evaluators provide summaries of the findings that R17CC staff may use immediately to make any necessary course corrections.

R17CC's collaborative project design process (e.g., capacity inventory and project logic model development) helps ensure projects are initiated at a place of client readiness. Engaging closely with clients during project design helps R17CC to ensure client willingness, as clients drive the focus of projects, and fosters readiness through the understanding of current client capacity. R17CC's collaborative project design process (e.g., capacity inventory and project logic model development) is designed to facilitate alignment of project outcomes to broader client goals. Working side-by-side with clients to establish project outcomes utilizes their intimate knowledge of either their agencies' or individual units' strategic goal(s) to ensure the collaboratively developed project outcomes and client goals align.

As R17CC continues its work into the last year of the contract, R17CC leadership will continue to document and build capacity with sustainability in both organizations and individuals.

To gather evidence of sustainability over time, the external evaluator has been tracking several key GPRA and program-level measures for all four years of the project, as demonstrated in the graphs below. Some of the performance measures have changed as the national Working Group refines the GPRA measures, so some of the data are not included below because they were measured differently or not at all.

In Figure 1, we can see that the R17CC has been able to sustain excellent levels of stakeholder satisfaction with respect to the quality, usefulness, and relevance of the R17CC's services and products over time. There is a very slight dip in Year 4, but it is not significant. Based on this evidence, we conclude that the R17CC team has been able to sustain high levels of satisfaction among its stakeholders in Region 17 over the last four years. Based on past performance, we expect that this level of satisfaction will continue to be sustained.

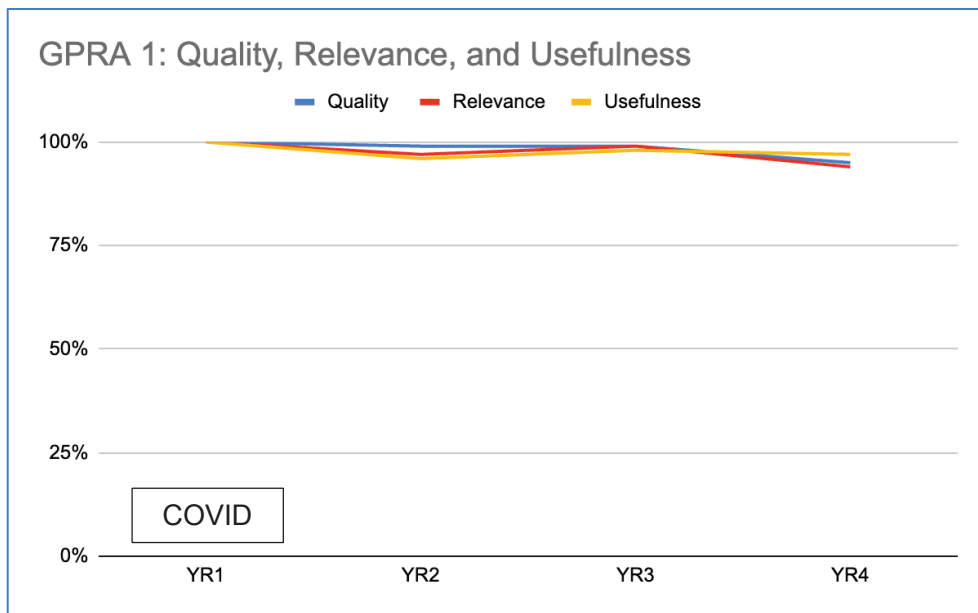


Figure 1. GPRA 1 performance over time. (Note: YR1 includes SEA leads only and YR2-4 includes SEA leads plus all TA recipients.)

In Figure 2, we can see that the R17CC has been able to sustain and even increase the number of TA recipients at R17CC events over time. Based on this evidence, we conclude that R17CC has processes in place to sustain, if not continue to increase, its audience reach over time.

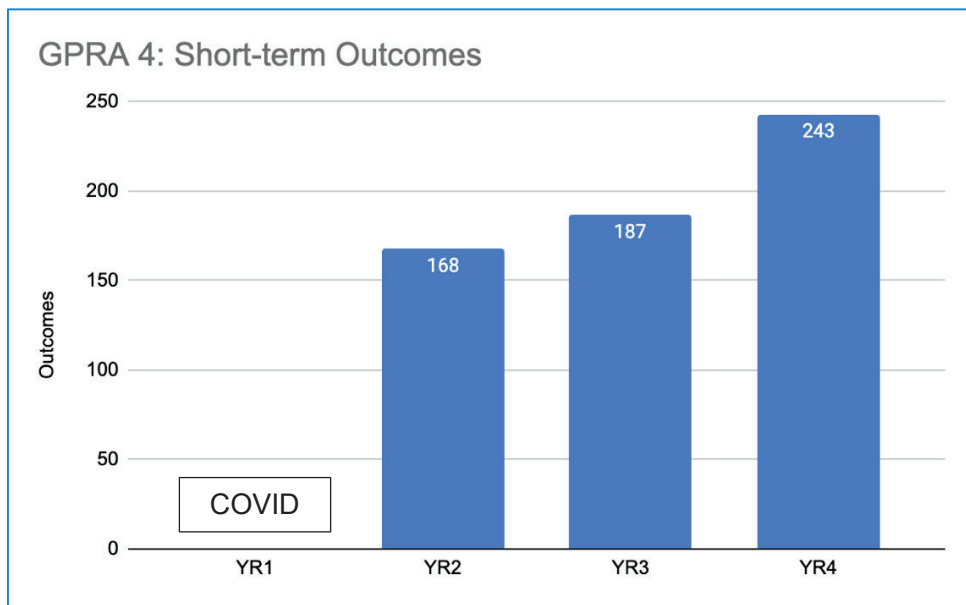


Figure 2. GPRA 2 performance over time.

Figure 3 tracks data related to GPRA 3 measures over time. Here we can see that with respect to achieving milestones (we only tracked this for the past two years), R17CC is achieving a very high proportion of its planned milestones. Since we only have two years' worth of data, we cannot draw any conclusions about sustainability with respect to milestones yet.

With respect to outputs achieved, R17CC has met its targets for outputs more consistently in the past two years than in the first two. Thus, we see improvement over time, although Year 4 was lower than Year 3. This is likely due to the challenges described above. We conclude that the R17CC has the capacity to sustain its output production over time, but will watch closely as the challenges in the states are mitigated and, hopefully, some stability is reached going forward into Year 5.

With respect to work plans, the R17CC has demonstrated perfect performance over the past four years. Based on this performance, we conclude that the R17CC will be able to sustain its efforts with respect to developing workplans with the states going forward.

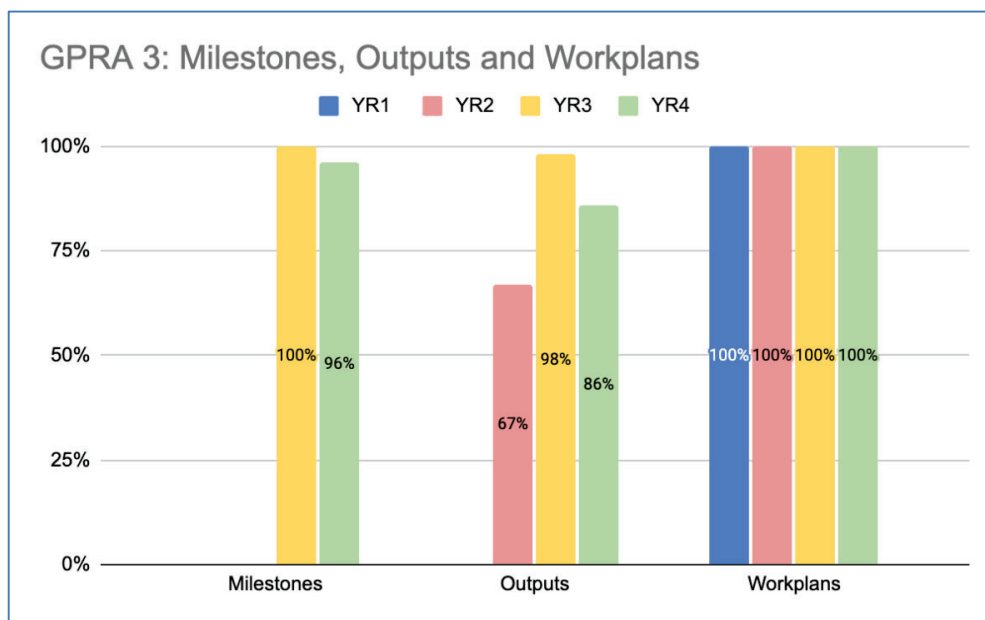


Figure 3. GPRA 3 performance related to milestones, outputs, and workplans over time.

In Figure 4, we can see that the R17CC has been able to sustain and even increase the number of short-term outcomes achieved over time. Based on this evidence, we conclude that R17CC

will be able to meet or exceed the number of short-term outcomes it has planned over time. We do not yet have data on medium- or long-term outcomes.

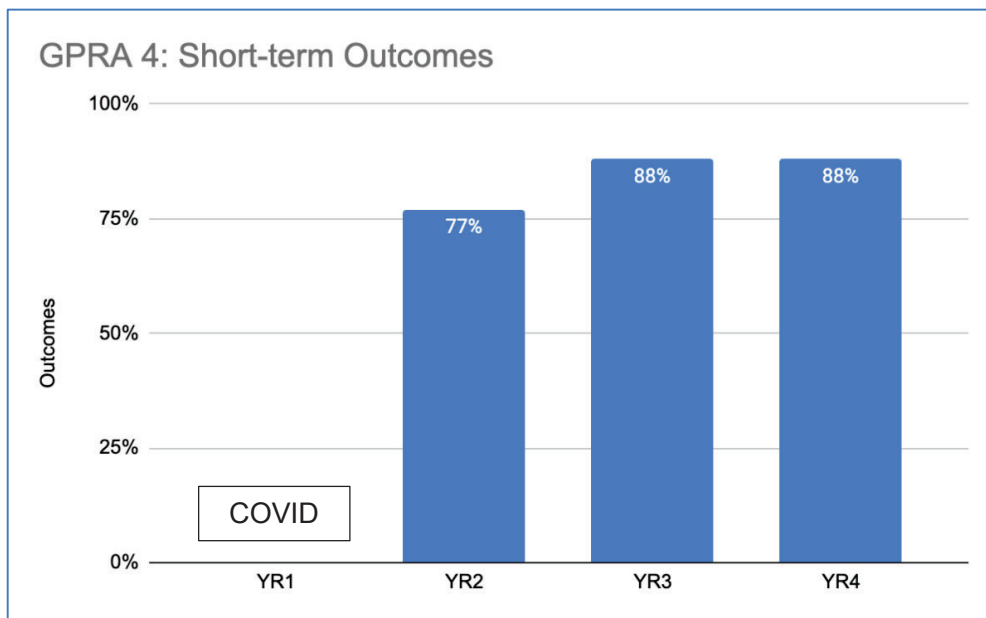


Figure 4. GPRA 4 performance over time.

Section 3: Partnerships

3.1 Strategic Partnerships

R17CC developed a set of active partnerships which have helped it contribute to meeting expected outcomes. Table 2 summarizes R17CC's major partnerships for Year 4. R17CC extended its focus on accelerated learning with the National CC's accelerated learning group. Concurrently, R17CC furthered its efforts focused on Social Emotional Learning (SEL) and teacher recruitment and retention through engagement with the National CC's SEL and Diversifying the Teacher Workforce working groups. R17CC was also involved in collaborating with the National CC's American Indian and Alaska Native Education Project, which was designed to help SEAs collaborate with tribal educators and leaders to enhance the learning of Native students. R17CC collaborated with the Region 16 CC on the RISE Network, and collaborated with the Regional Educational Laboratory Northwest (RELNW) to support their work in the region.

R17CC's approach to collaboration did not change throughout the year. However, its opportunities for strategic partnerships have proven useful. As a result, when planning projects, R17CC was more purposeful in identifying opportunities for collaboration. It also took a more active role in advocating for opportunities to be more actively involved in National CC working groups. R17CC collaborations with other Regional Centers have provided opportunities to connect Region 17 (R17) SEA staff with SEA staff outside the region. These connections provide context and relevant examples of policy and practice which increases R17 SEA staff capacity to achieve desired policy and practice goals. Collaborations with Regional Education Labs increase both R17CC and R17 SEA staff capacity to engage with and consume best-practice evidence related to projects. For example RELNW provided a synthesis of best practices related to mathematical practices for the OPI math standards revision work. The REL engaged R17 and the OPI in a review of the synthesis to ensure we understood not only the findings but the methods for completing the synthesis as well.

RELNW is operating under a new organization this cycle. As a result, the ramp up to initiate projects and establish relationships with the SEAs in R17 took time. In this year, these relationships began to solidify which enabled R17 to engage in greater collaboration with RELNW in the scope of CC work.

Table 2: Partnerships

Partner	Partnership Description	Impact/Outcome of Partnership	Level of Engagement
National Comprehensive Center	R17CC engaged in the following National CC organized workgroups: (1) Accelerated Learning, (2) SEL, (3) Diversifying the Teacher Workforce, and (4) the American Indian and Alaska Native Education Project	-Development of resources for SEAs. Resources posted and distributed through National CC Website. -Enhanced capacity of R17CC through engagement with national and regional comprehensive staff.	Collaborate
Region 16 Comprehensive Center	Partnership to implement cross-regional project focused on small rural schools network.	-Ability to expand impact of project and reach of client engagement.	Coordinate
The Collaborative for Academic, Social, and Emotional Learning	As part of the Collaborating States Initiative (CSI), CASEL provided guidance on supportive legislation and creating conditions to support implementation.	-Opportunity to learn, support and connect with other state networks. -Opportunity to highlight MT OPI work at a national level. -Opportunity to guide, develop and influence resources developed at a national level. -Opportunity to receive research.	Cooperate
REL Northwest	R17CC partnered with REL Northwest to support applied research and data analysis within applicable projects.	-Ability to expand capacity of SEA to identify, analyze, and utilize data in decision making.	Collaborate

Section 4: Conclusions and Recommendations

Key Outcomes

The key outcomes R17CC achieved in Year 4 are summarized below:

Table 3: Key Outcomes

Objective	Outcomes
Objective 1 (GPRA 1)	<ul style="list-style-type: none"> Stakeholders were highly satisfied with the quality (95%), usefulness (97%), and relevance (94%) of the R17CC's work.
Objective 2 (GPRA 2)	<ul style="list-style-type: none"> 243 TA recipients participated in R17CC events. 1,076 individuals were reached with R17CC's universal TA services. Eight different types of stakeholders were reached by the R17CC's work.
Objective 3 (GPRA 3)	<ul style="list-style-type: none"> 96% of R17CC's planned milestones were achieved. 86% of its planned outputs were achieved. R17CC exceeded all its targets with respect to GPRA 3, demonstrating that capacity-building services were implemented as intended.
Objective 4 (GPRA 4)	<ul style="list-style-type: none"> 88% of R17CC's short-term outcomes were achieved. R17CC exceeded all its targets with respect to GPRA 4, demonstrating that recipient outcomes were met.
Objective 5	<ul style="list-style-type: none"> R17CC consulted and collaborated with five partners in Year 4.
Project-specific	<ul style="list-style-type: none"> R17CC achieved 6 out of 8 project-specific goals in Year 4.

Challenges Addressed

Both states experienced turnover in Year 4. The turnover had different impacts on R17CC's work. R17CC leadership has collaborated with the states to keep the projects on track. In all cases, a focus on documentation and communication has been key. The evaluation data collected in Year 4 provides evidence that R17CC has successfully mitigated these challenges.

Conclusions and Recommendations

The R17CC has been able to achieve success on all of the key outcomes. Performance on a set of GPRA measures over the past four years provides solid evidence that, despite the challenges faced this year, the R17CC has the capacity to sustain its positive performance with respect to capacity-building and program impacts over time. Both Idaho and Montana experienced unprecedented upheaval and staff turnover this year, so we recommend R17CC continue to collaborate closely with the states and to support them during these transitions. Year 5 will hopefully bring stability so the states can focus on impacts.

APPENDIX H. REGION 11 COMMUNICATION AND DISSEMINATION PLAN

Identify Audiences and Develop Plan

To establish a strong communication and dissemination foundation, we will first review core audiences and essential contacts, understand the effectiveness of existing communication channels, gauge awareness of the CC and its work, and identify opportunities to improve coordination and dissemination. Our existing communications plans from statewide projects—including Region 17 CC, the Washington and Alaska Family Engagement Centers, ODE’s early indicator and intervention system professional learning project, and ODE’s multilingual learner strategic plan—provide a strong starting point. Through the review, we will:

- Examine existing communication and dissemination channels to understand where and how most communication occurs and with which audiences
- Confirm existing and establish new dissemination channels
- Gather and review data on current Region 16 and 17 CC social media engagement
- Meet with SEA communications offices to gauge their thoughts on existing communications, opportunities for engagement and dissemination, and overall awareness about CCs and their work

We will regularly review data to assess outreach effectiveness and adjust our approach as needed. We will incorporate findings into an annual communications and dissemination plan that includes:

- A monthly editorial calendar with regular social media posts and a monthly newsletter highlighting blog posts, infographics, case studies, videos, tools, podcasts, and outputs from our intensive TA work
- Defined audience segments we need to meet goals

- Outlets where our audiences seek out information, including CC Network and other websites, newsletters, and conferences (project presentations)
- A monthly internal communications coordination calendar to align with project schedules and launch of new resources or supports
- Communications champions—including individuals and organizations—at the local, regional, and state level and their mechanisms to promote R11CC resources and services nationally (e.g., National CC, members of the CC network) so we can broadly disseminate evidence-based practices and lessons learned
- Performance measures for project communications

The plan will ensure that key R11CC initiatives and products have clearly defined goals, intended audiences, outlets, key messages/talking points, an editorial calendar, common language for internal and external communications (e.g., email announcements, press releases, webinar announcements, social media posts), and strategies to measure reach, use, and effectiveness. The plan will also outline timelines for development and implementation. Based on feedback, we will revise the R11CC communications plan and project-level plans as part of yearly service planning and make real-time adjustments throughout the year as needed. This will ensure that content is timely and relevant and reflects new research and emerging best practices.

Identify Ongoing Project-Level Opportunities

On a quarterly basis, stakeholder engagement and communications team members will meet with project staff members to identify resources, evidence-based practices, and lessons learned to disseminate through R11CC, partners, and the CC Network, including the Comprehensive Center Network website. Content may include success stories, webinars, factsheets, and articles or videos. Through these materials, we will elevate successes and learnings from state, local, regional, and Tribal education agencies who receive CC services. Our

team will also plan a regular newsletter and social media posts that feature R11CC projects, research, success stories, feedback data, and other content relevant to our audiences. We will build a newsletter distribution list through our stakeholder engagement work and disseminate sign-up details and teaser content across multiple partners and channels. We will also create R11CC templates and other communication resources, such as a website, core one-pager introducing our approach, services, and team; PowerPoint and other templates; boilerplate language; and a style guide with editorial and visual guidance. These resources will shape clear, consistent messaging so that audiences know what the CC is and what services we offer.



Tailored Dissemination Strategies. FHI 360 partnered with the Consumer Financial Protection Bureau to design, develop, and disseminate financial education materials for teachers and families. FHI 360 created a plan for reaching diverse audiences through a range of channels, including social media, email blasts, conferences, and focused outreach to financial education decisionmakers. As a result, more than 100,000 users—including SEAs, out-of-school time providers, and teachers—across the country have accessed the materials. Every second and third grader in the state of Maine receives a copy of the financial education storybooks we created.

Customize Communications and Dissemination Strategies Based on the Needs of Targeted Audiences

We understand that one-size-fits-all communications are unlikely to reach and move all intended audiences, especially groups that are historically marginalized. Our team will use formative research, such as listening sessions and other methods of engagement, to understand the messages that will most resonate with different audiences. Our planning will include strategies for reaching diverse groups, with a focus on using accessible and culturally relevant images, language, and stories.

Communications for R11CC projects will be designed in consultation with clients, aligned to project objectives, tailored to the needs of clients, and measured for reach and impact. At the start of every project, the communications team will meet with the project staff to understand project goals and activities, clients' needs, learning opportunities, and key audiences—including direct service recipients as well as those who may be impacted by the services. We will also meet with clients to understand the most effective forms of resources and communications for them.

Monitor and Measure Audience Engagement and Use

As project content and messaging are disseminated, we will track communications across multiple strands, logging both internal and external initiatives as well as formal and informal audience feedback. This may include social media engagement, audience reach via partner organizations, and website analytics. We will also identify opportunities to include communications products in project-level continuous improvement processes, for instance, by asking questions about material usefulness and relevance in stakeholder engagement surveys.

APPENDIX I. DESCRIPTIONS OF SELECT REGION 11 PARTNER PROJECTS

EDNW PROJECTS

Washington Professional Educator Collaborative (2020-2022) \$150,000: This collaborative between the Washington OSPI and the Professional Educator Standards Board was tasked with recommending how to strengthen and improve state policies, programs, and pathways that lead to highly effective educators. The Collaborative published a final report with recommendations, which have been considered by the legislature. EDNW facilitated the workgroup that developed the recommendations and authored the reports (Bel Hadj Amor et al., 2020 and 2021).

Higher Education Coordinating Commission Community of Practice (2022-2023) \$90,000: Oregon's six public educator preparation programs must submit to the Higher Education Coordinating Commission (HECC) a biennial institutional plan with goals, strategies, and deadlines to recruit, admit, retain, and graduate diverse educators. In 2022, HECC and the Educator Advancement Council (EAC) hired EDNW to conduct a study on how equity plans impact institutional efforts to recruit, develop, and graduate diverse educators. In addition to the study, EDNW facilitates a community of practice among the educator preparation programs. One of the initial tasks of the community of practice was a series of alignment conversations between the HECC, EAC, and the Teacher Standards and Practices Commission (TSPC) to identify responsibilities for each organization; discuss the expected outcomes of each organization; and categorize outcomes as short, mid, or long term. We collectively delineated agency roles and responsibilities to support the EPPs to meet the state's educator workforce goals. Additionally, HECC, EAC, TSPC, and EDNW updated the process for reviewing educator equity plans. As a result, the state agencies collaborated to offer more concrete guidance in the form of a rubric; more consistent two-way communication by including Q&A with HECC, EAC, and TSPC

during the monthly community of practice; and a narrowed focus on fewer, more concrete and measurable equity plan goals. EDNW’s review of the 2020 equity plans resulted in the 2022 report *Applying Guidance for Real Progress: Current Efforts for Equity in Oregon’s Educator Preparation Programs*.

Alaska DEED Science of Reading (2021-2022) \$316,000: EDNW provided eight one-hour training sessions for principals across Alaska on implementing and leading science of reading in their schools. Principals also engaged in a community of practice to share and learn from each other. Training sessions were delivered virtually with online modules subsequently archived on the DEED website for future access. We collected data from participants at multiple points to gauge their learning and evaluate the course to improve the training and inform DEED’s future professional learning offerings. Overall, 80 percent to 90 percent of respondents saw the academy as significantly contributing to their learning. Additionally, at least 93 percent of respondents from both cohorts found the content of the training useful, and at least 93 percent deemed the content high quality.

“The idea of educators from all over the state getting on the same page, using the same language. It’s nice to know that I’m on the right track.”

“It was a great introduction for leading the push for the science of reading in my school building. It gave me vital background information.”

– Alaska DEED Science of Reading cohort 1 and 2 participants

The Math Innovation Zone (R17CC) program prepared schools to transition to personalized learning models in math by providing design and planning support through a full school year. EDNW worked alongside a community of practice supported by the Montana OPI and education experts to create an approach to the transition. We also co-developed processes and guiding documents to facilitate school fidelity to the project as well as promising practices that support students. This effort produced innovative professional learning for teachers around

Standards for Mathematical Practice (NCTM, 2010), including an online survey that assesses and creates detailed training plans for individual teachers. Parent Universities were also created to collaborate with families and provide meaningful ways to reinforce math concepts at home.

EDNW **supported the Region 16 CC in exploring Indigenous school improvement plans:** plans rooted in Indigenous ways of knowing, rather than a standard plan focused on Indigenous students. We conducted a literature review to identify efforts and supports across the U.S. that show evidence or promise in successfully developing and implementing P–12 school improvement models rooted in Indigenous ways of knowing. We carried out culturally responsive interviews with key individuals in the field of Indigenous school improvement as well as engaged in deeper conversations with Indigenous education leaders and scholars in Idaho, Oregon, and Washington. The resulting report includes an infographic outlining five foundational elements of Indigenous education models (Davidson et al., 2023). The work and final products aim to deepen understanding of prospective designs for an education system that holistically supports Native students in the state of Washington.

Region 16 CC contracted with EDNW to conduct a **landscape analysis of efforts to recruit, prepare, and retain Indigenous educators** across the U.S. The team conducted a literature review and an analysis of national teacher education program data and used this information to carry out culturally responsive interviews with key individuals at teacher education programs, school districts, and other organizations that support Indigenous educators and Tribal colleges from across the country. The resulting report identified key strategies for recruiting and retaining Indigenous students in teacher education programs as well as in schools and districts. The report and an accompanying slide deck were shared with audiences across Washington state and the region to expand supports for Indigenous educators (Region 16 CC, n.d.).

In fall 2017, the **Cow Creek Band of Umpqua Tribe of Indians (CCBUTI) (2017-2020) \$200,000** asked EDNW to develop historically accurate, culturally embedded, place-based, contemporary, and developmentally appropriate curriculum, assessment tools, and instructional materials for grade 4. When the ODE granted CCBUTI additional funds for Tribally specific lesson development through Senate Bill 13: Tribal History/Shared History, CCBUTI invited EDNW to continue this important work. Over the past six years we expanded the project to include units for all grade levels.

EDNW is partnering with FHI 360 to support ODE on the implementation of an **Early Indicator and Intervention System (EIIS) (2023-2026) \$900,000** across the state of Oregon. As part of the 2019 Student Success Act, school districts were provided grant resources to assist with developing early indicator and intervention systems (EIIS) locally to align school, district, and community systems and help students stay on track, or get back on track, to graduate from high school. EDNW and FHI 360 have co-designed and developed and is facilitating three unique professional learning series to build the capacity of Oregon educators to implement the EIIS legislation. Each series includes virtual workshops, personalized job-embedded district coaching, e-modules for asynchronous learning, and a set of tools and resources to make the learning actionable.

CHILD TRENDS PROJECTS

Funded by the U.S. Department of Education, the **National Evaluation and Technical Assistance Center for the Education of Neglected or Delinquent Children & Youth (NDTAC)** is a national resource and TA center that provides direct assistance to states, schools, communities, and parents seeking information on educating children and youth considered

neglected, delinquent, or at risk. Child Trends is an operating partner of NDTAC, along with Longevity Consulting, Break Free Education, and Cyber Synergy.

The **National Early Care and Education Workforce Center** focuses on equity and justice for the early care and education workforce. Child Trends is one of five core organizations that partner to operate the center, which is the nation's leading resource for early care and workforce development. Through engagement, research, TA, and communications, we aim to disrupt current practices, strengthen systemwide coordination and policies, identify innovative solutions for supporting compensation and career advancement, advance workforce well-being, and improve equitable access to highly qualified early childhood educators.

FHI 360 PROJECTS

Through the **Office of Elementary and Secondary Education Innovation and Research TA & Dissemination task order**, FHI 360 devises communication goals; clarifies key messages; identifies target audiences; develops a communication plan with action steps and timelines; develops and disseminates research products and materials (e.g., research brief on reconnecting with families post COVID-19) through email announcements, press releases, and social media posts; and measures the effectiveness of dissemination activities.

Summer Program Redesign: FHI 360 helps Portland Public Schools and Seattle Public Schools redesign their summer programs so they can accelerate learning and foster students' social, emotional, and mental health needs while preparing them for academic success. The District Summer Learning Network project has worked with more than 100 districts nationally, serving more than 2 million students.

REFERENCES

Bel Hadj Amor, H., Greenberg Motamedi, J. & Velie, Z. (2020). *Professional Educator Collaborative: Preliminary report to the Washington Legislature*. Professional Educator Collaborative. https://drive.google.com/file/d/1_7UVpayGD2TIogf-hqAxmOBfEnEy989W/view

Bel Hadj Amor, H., Greenberg Motamedi, J. & Velie, Z. (2021, November). *Professional Educator Collaborative: Final report to the Washington Legislature*. Professional Educator Collaborative. <https://drive.google.com/file/d/1Y7mPbQKC0rN0Cccw01TCEbjyePQSTgGK/view>

Davidson, S., Broaddus, M. S., Velie, Z., & Brey, L. (2023). *Foundations of Indigenous education in the Pacific Northwest: Learning from leaders and scholars in the region*. Region 16 Comprehensive Center. <https://r16cc.org/wp-content/uploads/2024/03/Foundations-of-Indigenous-Education-in-the-Pacific-Northwest-508c.pdf>

National Council of Teachers of Mathematics (2010). Common Core State Standards for Mathematics. https://www.nctm.org/uploadedFiles/Standards_and_Positions/Common_Core_State_Standards/Math_Standards.pdf

Region 16 Comprehensive Center. (n.d.). Recruiting and retaining Indigenous educators for school and district leaders: Key findings. https://r16cc.org/wp-content/uploads/2024/03/Recruiting-and-Retaining-Indigenous-Educators.ac_.pdf

Other Attachment File(s)

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ATTACHMENT

Resumes for Project Directors and Key Personnel

CO-DIRECTORS AND Jennifer Esswein

PROJECT LEADS | Christine Pitts

PROJECT MANAGER | Lymaris Santana

PROJECT LEADS | Jacob Williams

Manuel Vazquez

Jennifer Johnson

QUALITY ASSURANCE LEAD | Catherine Barbour

INTERNAL EVALUATOR AND

ENGAGEMENT/OUTREACH CO-LEAD | Elizabeth Gandhi

ENGAGEMENT/OUTREACH CO-LEAD | Misha Galley

EVALUATION LEAD | Christine Andrews

TA PROVIDERS AND

CONTENT EXPERTS | Mandy Smoker Broaddus

RunningHorse Livingston

Cortney Rowland

Silvana Hackett

Ben Cronkright

Tameka Porter

Obioma Okogbue

Rebecca Jones

Jennifer Esswein

Proposed Role: Co-Director

Director, Applied Research and Evaluation

jennifer.esswein@ednw.org



Accomplished educational leader with experience in managing large-scale educational projects, providing high-quality technical assistance, and implementing evidence-based practices. Expertise in statutory requirements, regulations, and policies related to ESEA programs. Proven track record in working with high-needs students and communities, fostering collaboration, and driving systemic educational improvements. Holds a Ph.D. in Quantitative Research Evaluation and Measurement in Education.

Primary areas of expertise

- Technical assistance for SEA systems improvement, specifically capacity building around data and evidence use
- Evaluation design and quantitative analysis
- School accountability systems and school improvement
- Statewide assessment
- Project management

Directly related project experience

Region 17 Comprehensive Center

2019–present

U.S. Department of Education, Office of Elementary and Secondary Education |

Roles: Co-Director, Project Lead, Technical Assistance Provider

Oversees all aspects of the Region 17 Comprehensive Center and leads project work in Idaho and Montana. Project work includes support for Montana teacher residency and overall program improvement in Idaho through continuous improvement cycle application.

Regional Educational Laboratory Northwest

2014–2021

U.S. Department of Education, Institute of Education Sciences

Roles: Deputy Director, Task 5 TCTS Lead, Partnership Lead, Technical Assistance Provider

Works closely with the director on the management team, program team, and leadership team to oversee the progress of the work, provide quality review, and oversee budgets. Served as Task 5 lead, overseeing technical assistance to multiple research alliances. Provide quality control and management oversight.

Northwest Comprehensive Center

2014–2019

U.S. Department of Education, Office of Elementary and Secondary Education |

Roles: Technical Assistance Provider, Project Lead

Implements technical assistance projects aligned with Idaho's highest priority needs, which include enhancing the support provided to LEAs and priority/focus schools, supporting and assessing the accountability systems, improving the alignment and coherence of the federal programs division, and supporting implementation of Idaho Core Standards.

Accountability System Development**2013–2014**

Tennessee Department of Education

Role: Deputy Director

Created new accountability plan, specifically district designation methodology. Designed communication of new system for State Department of Education Commissioner, Data and Research Assistant Commissioner, as well as district superintendents. Managed two Office of Research and Policy analysts for modeling system with past data.

ESEA Title I School and District Accountability Determinations**2013–2014**

Tennessee Department of Education

Role: Project Manager

Created all business rules associated with district and school accountability methodology as outlined by the federal ESEA Waiver for district and school accountability. Conducted all calculations as outlined by business rules for district and school accountability using programming in STATA for all calculations and data manipulations for district and school accountability. Designed data verification processes for district and school accountability. Supported Assistant Commissioner of the Division of Data and Research with dissemination of designations and district appeals process for both district and school accountability.

Data Use Capacity Development**2013–2014**

Tennessee Department of Education

Role: Project Lead

Worked with the Office of School Improvement (within the division of CORE) to identify grant continuations and terminations through use of accountability data. Worked with the Division of Special Populations to make Students with Disabilities and English Language Learners district and school accountability designations.

School-Year Based Inquiry Learning Program in Science (SYBIL)**2011–2012**

U.S. Department of Education | Role: Research Specialist

Delivered inquiry-based science professional development for both middle and elementary school teachers. Designed curriculum. Developed evaluation instruments and collected teacher and student data. Analyze data and reported on program findings.

Inquiry-Based Professional Development Program in Science**2010–2011**

U.S. Department of Education | Role: Researcher

Served as internal project evaluator including developing evaluation instruments. Collected teacher and student data. Analyzed data and reported on program findings.

Professional experience**Education Northwest****2014–present***Director**2022–present**Senior Leader and Manager**2019–2022**Leader**2018–2019**Senior Evaluation Advisor**2014–2018***Tennessee Department of Education****2012–2014***Deputy Director**2013–2014**Policy Analyst**2012–2013*

Strategic Data Project, Harvard University <i>Data Fellow</i>	2012–2014
The Ohio State University, Department of Physics <i>Course Trainer and Curriculum Developer</i> <i>Research Specialist</i>	2000–2012 2004–2012 2000–2001
The Ohio State University, School of Educational Policy and Leadership <i>Graduate Research Associate</i>	2007–2008
City College of New York <i>Program Coordinator, School of Education and Department of Physics</i>	2002–2003
The Ohio State University and Columbus City Schools <i>AmeriCorps Literacy and Math Member</i>	1997–1999

Education

Ph.D., Quantitative Research, Evaluation, and Measurement in Education, The Ohio State University	2010
B.A., English, Contemporary Literature, The Ohio State University	2000

Publications and Presentations

- Bowers, A.J., Ni, X., & Esswein, J. (2018) Using hierarchical growth modeling to promote district systematic improvement in Ohio and Texas. In H. Shaked, C. Schechter, & A. Daly (Eds.) *Leading Holistically: How Schools, Districts, and States Improve Systemically* (pp. 77–100). London, UK: Routledge.
- Esswein, J. (2013, March). MAAS reassignment and meeting district annual measurable outcomes. Invited presentation at the Annual SPED Conference and RTI Joint Summit, Nashville, TN.
- Esswein, J. (2013, January). Effects of inquiry-based pedagogical approaches on student learning. Invited presentation at American Association of Physics Teachers (AAPT) Winter Meeting, New Orleans, LA.
- Dougherty, A.W., Esswein, J., & Chediak, A. (2013, January). Testing student misconceptions in energy, momentum and rotational dynamics. Presentation at AAPT Winter Meeting, New Orleans, LA.
- Aubrecht, G. J., Schmitt, B., & Esswein, J. (2012, July). Convincing middle, high school teachers of the value of formative assessment. Presentation at AAPT Summer Meeting, Philadelphia, PA.
- Patton, B.R., Esswein, J., & Mescher, J. (2012, February). Reasoning and content learning in diverse student populations. Presentation at AAPT Winter Meeting, Ontario, CA.
- Mescher, J., Esswein, J., & Patton, B.R. (2012, February). Implementation of new science core standards by in-service teachers. Poster at AAPT Winter Meeting, Ontario, CA.
- Esswein, J., Mescher, J., & Patton, B.R. (2012, February). Measuring scientific reasoning ability at the middle school level. Poster at AAPT Winter Meeting, Ontario, CA.
- Patton, B.R., & Esswein, J. (2011, August). The role of scientific reasoning ability in student learning. Invited presentation at AAPT/Physics Education Research Conference Summer Meeting, Omaha, NE.
- Esswein, J., & Patton, B.R. (2011, August). Scientific reasoning: Teacher and student connection. Contributed poster at AAPT/Physics Education Research Conference Summer Meeting, Omaha, NE.

Esswein, J. (2011, June). Scientific inquiry: Engaging your students to deepen understanding. Invited talk at the Basic School Summer Institute, Columbus, OH.

Esswein, J., Mescher, J., & Patton, B.R. (2011, February). School year-based inquiry learning (SYBIL) with elementary and middle school teachers. Invited presentation of program results at DOE Mathematics and Science Partnership Meeting, Baltimore, MD.

Esswein, J., Mescher, J., & Patton, B.R. (2011, April). Effect of teacher reasoning ability on student learning. Proceedings of the NARST 2011 Annual Meeting, Orlando, FL.

Patton, B.R., & Esswein, J. (2010, July). The development of scientific reasoning in traditional vs. inquiry-based physics. Invited presentation at AAPT Summer Meeting, Portland, OR.

Esswein, J., Mescher, J., & Patton, B.R. (2010, February). School year-based inquiry learning (SYBIL) with elementary and middle school teachers. Invited presentation at DOE Mathematics and Science Partnership Meeting, San Diego, CA.

Specialized training and expertise

- Project Management Professional (PMP) certification training, Learners Ink
- What Works Clearinghouse Certified Reviewer (Group Design Standards v. 4.1)

Dr. Christine Pitts

Proposed Role: Co-Director

Senior Fellow

christine.pitts.sf@ednw.org



Christine Pitts is a lifelong educator and mission-driven non-profit leader with solid business acumen and a tenacious spirit. She brings 18+ years of progressive leadership experience in schools, districts, and non-profit agencies. As an executive leader, she understands how vital evidence-informed decision-making is for philanthropy, policymakers, and school system leaders who aim to transcend the barriers built into our nation's social systems. Christine is adept in creating and fostering programs, partnerships, networks, and coalitions toward social and organizational impact. Her academic research on student engagement, global citizenship, and school governance has been published in prestigious academic journals such as Educational Researcher and Teachers College Record. She also regularly contributes thought leadership to national media outlets, including the New York Times, ProPublica, Politifact, Chalkbeat, and the 74 Million. She is a skillful leader who genuinely enjoys developing and managing productive and caring teams through responsive and affirming mentorship and coaching.

Primary areas of expertise

- Assessment and accountability
- School improvement
- Education governance
- Literacy and reading development

Directly related project experience

National study on the barriers to implement the science of reading.

2023–2024

Teach Plus

Role: Research and policy consultant

Designed and executed a national study of teacher perceptions about the science of reading policies. Including working with representatives of state policymakers to craft evidence-based recommendations for state education agencies implementing new teacher preparation, training, and high-quality instruction programs around early literacy.

Data and research operations

2020–2021

Portland Public Schools

Role: Research and Evaluation Manager

Pioneered a comprehensive business model for districtwide research and evaluation, encompassing organizational goal setting, service delineation, and a framework for evaluating large scale programs. Established a new research protocol alongside community partners to evaluate public-private partnerships focused on family engagement, student social and emotional learning, and identity affirming academic programs.

National and state coalition building**2019–2020**

NWEA

Role: Policy Advisor

Established national education advocacy coalitions to advance evidence-based policy recommendations across states. Partnered, through the coalitions, with state education agency leaders to test, understand, and improve recommendations for their unique context.

Multi-district arts integration program**2014–2017**

Education Policy Improvement Center

Role: Research Assistant

Helped direct a four-year research initiative advancing arts integration across three school districts. Cultivated the multi-district alliance to support teacher training, schoolwide implementation, and school improvement protocols based on creativity and arts integrated into academic programming. Conducted program evaluations for state and local entities to address urgent policy issues.

Statewide analyses and regional support**2013–2014**

Oregon Education Investment Board

Role: Research Assistant

Conducted policy analyses for intergovernmental initiatives, delivering comprehensive reports to the governor's office and the state education agency. Played a key role in the study of statewide regional hubs dedicated to advancing school improvement, fostering early learning, and promoting teacher diversity.

Professional experience

Education Northwest**2024–present***Senior Fellow***Pitt Consulting, LLC****2023–present***Founder and Principal***The Education Policy Hotlist****2020–present***Founder***Center on Reinventing Public Education****2021–2023***Director of Impact and Communications***Portland Public Schools, Portland, Oregon****2021–2023***Research and Evaluation***NWEA, Portland, Oregon****2017–2020***Policy Advisor***Education Policy Improvement Center, Eugene, Oregon****2014–2017***Research Assistant***Oregon Education Investment Board, Salem, Oregon****2013–2014***Research Assistant***Education**

Ph.D., Education, The University of Oregon

2018

MAEd, East Carolina University
B.S. East Carolina University

2011
2009

Publications

- Bailey, L., Ledger, S., Thier, M., & Pitts, C. (2022). Global competence in PISA 2018: deconstruction of the measure, Globalisation, Societies and Education. *Globalisation, Societies and Education*. DOI: 10.1080/14767724.2022.2029693
- Kuhfeld, M., Soland, J., Pitts, C., & Burchinal, M. (2020). Trends in children's academic skills at school entry: 2010 to 2017. *Educational Researcher*. <https://doi.org/10.3102/0013189X20931078>
- Ledger, S., Bailey, L., Thier, M., & Pitts, C. (2019). OECD's approach to measuring global competency: Powerful voices shaping education. *Teachers College Record*, 121(8).
- Anderson, R., Haney, M., Pitts, C., Porter, L., & Bousselot, T. (2019). "Mistakes can be beautiful": Creative engagement in arts integration for early adolescent learners. *The Journal of Creative Behavior*. doi: 10.1002/jocb.401
- Pitts, C., Anderson, R., & Haney, M. (2018). Measures of instruction for creative engagement: Capturing what eludes traditional teacher observation measures. *Learning Environments Research*, 21(43). doi: 10.1007/s10984-017-9238-9
- Anderson, R., Pitts, C., & Smolkowski, K. (2017). Creative ideation meets relational support: Measuring links between these factors in early adolescence. *Creativity Research Journal*, 29(3). <https://doi.org/10.1080/10400419.2017.1360057>
- Anderson, R., Thier, M. & Pitts, C. (2017). Interpersonal and intrapersonal skill assessment alternatives: Self-reports, situational-judgment tests, and discrete choice experiments. *Learning and Individual Differences*, 53, 47 – 60. <http://dx.doi.org/10.1016/j.lindif.2016.10.017>
- Thier, M., Anderson, R., Smith, J., & Pitts, C. (2016). Influential spheres: Examining actors' perceptions of education governance. *International Journal of Education Policy & Leadership*, 11(9). <http://journals.sfu.ca/ijepl/index.php/ijepl/article/view/682>
- Beach, P., Thier, M., Fitzgerald, J., & Pitts, C. (2018). Cutting-edge (and dull) paths forward: Accountability and Career Technical Education under the Every Student Succeeds Act. In G. Lauzon (Ed.), *Educating a working society: Vocationalism, the Smith-Hughes Act, and modern America*. Charlotte, NC: Information Age.
- Anderson, R. & Pitts, C. (2017). Growing sustainable school culture: Arts integration to nourish the soil and the seeds. In Rajan, (Ed.): Palgrave Macmillan. R. & Curtis, I. *Arts Evaluation and Assessment: Measuring Impact in Schools and Communities*. United Kingdom: Palgrave Macmillan.

Presentations

- Pitts, C. (2023, February). *The State of the American School District*. The National Conference on Education, AASA, The School Superintendent Association. San Antonio, TX (*National*).
- Pitts, C., Munyan-Penney, N., Goldhaber, D., Daly, T., & Tek, B. (Submitted). *An Emerging Post-COVID Framework for Educational Assessment and Research*. Symposium submitted to the Chief Council of State School Officers' National Conference on Student Assessment 2021. Virtual (*National*).

- Pitts, C.**, Irwin, M., Ralston, N., & Johnson, A. (2021, March). *The Early Childhood Long-Game: Community-Driven Policy Initiatives for Equitable, Accessible, and Quality Preschool*. Association for Education Finance and Policy (National).
- Ledger, S., Thier, M., Bailey, L., & **Pitts, C.** (2020, August). *OECD Global Competencies – is it for everyone?* Paper accepted for presentation at the World Education Research Association. Santiago de Compostela, Spain. (*International*)
- Pitts, C.**, Polikoff, M., Goldhaber, D. & Schwinn, P. (2020, June). *Advancing Equity in State Accountability: Exploring the Role for Proficiency and Growth in School Evaluation*. Policy talk to be presented at Chief Council of State School Officers National Conference on Student Assessment. Denver, CO. (*National*).
- Pitts, C.** (2020, April). *A Dynamic Network Study on Consolidated State Governance and Bipartisan Voting*. Paper accepted at the American Educational Research Association. San Francisco, CA. (*National*).
- Pitts C.**, Chor, E., Estrera, E., Rothbart, M.W., Marcotte, D.E. (2020, March). *Factors Shaping Early Childhood & Kindergarten Outcomes*. Chair of session at Association for Education Finance and Policy annual conference. Fort Worth, TX. (*National*).
- Pitts C.**, Hernandez, D., Fick, T., Feibel, S., & Hepper, D. (2020, March). *How State Coalitions Co-Construct Policy and Funding Mechanisms for Equity in Early Childhood Education*. Policy talk to be presented at the Association for Education Finance and Policy annual conference. Fort Worth, TX. (*National*).
- Kuhfeld, M., Soland, J., **Pitts, C.** (2019, November). *Trends in Children’s Academic Achievement at School Entry: 2010-2017*. Paper presented at the Association for Public Policy and Management. Denver, CO. (*National*)
- Pitts, C.** (2019, April). *Influential State Politics: How Causal Narratives Shape Influential Legislators’ Policy Agendas*. Paper presented at the Midwest Political Science Association. Chicago, IL. (*National*)
- Ledger, S., Thier, M., Bailey, L., & **Pitts, C.** (2018, August). *Global Competencies as Portrayed and Promoted by the OECD: A Policy Text Review*. Paper accepted for presentation at the World Education Research Association. Cape Town, South Africa. (*International*)

Specialized training and expertise

- Instructor, the University of Oregon, master's in education policy and leadership, 2022-2023
- Region 16 Comprehensive Center, Advisory Board Member, 2021
- Certificate in Education Finance, Georgetown, 2021
- Oregon Student Success Act Quality Assurance Panel, 2020
- Community Budget Review Committee, Portland Public Schools, 2019 – 2020
- College of Education, Dean’s Advisory Board, University of Oregon, 2014-2016
- Leadership Institute: Changing the Culture of Schools through Equity, University of Oregon, 2014
- Taking it up: Conversations about race inequities, 4J School District, 2013.

Lymaris Santana

Proposed Role: Project Manager

Principal Consultant, Equity & Systems Improvement

llymaris.santana@ednw.org



Lymaris Santana, Ed.D. Lymaris is a senior advisor for equity and systems improvement at Education Northwest. Lymaris is a certified reading specialist with more than 20 years of experience as an educational leader at the school, district, and state levels, developing, implementing, monitoring, and evaluating literacy and equity initiatives. She has led multiple multi-tiered systems of support (MTSS) teams with an emphasis on interventions, enrichment, and compliance. She has extensive experience serving multilingual communities, designing, and providing professional learning on evidence-based practices for multilingual learners, and engaging families from culturally diverse communities. Lymaris has also developed, coordinated, and supervised after-school and summer programs for underserved populations, with a focus on tutoring and academic performance. As a regional literacy director for the Florida Department of Education, she provided technical support to district and school leaders across the state in the implementation of literacy standards and evidence-based early literacy instruction. In this role, she also reviewed school improvement plans and monitored district, school, and classroom-level data. In collaboration with the Florida Center for Reading Research, her projects included evaluating the effectiveness of professional development in changing instructional practices, and its impact on student achievement. Lymaris is a graduate faculty scholar for the University of Central Florida's College of Community Innovation and Education, where she advises students in teacher preparation programs and serves on dissertation committees.

Primary areas of expertise

- Literacy
- K-12 Education
- Multilingual Education
- Adult Learning and Coaching
- School Improvement
- Teacher Preparation

Directly related project experience

Baltimore City Public Schools Literacy Leadership Program

2024-2025

Project Lead

Manage the planning and implementation of the project, ensuring timely and budget-conscious progress. Develop and facilitate professional development sessions and communities of practice, utilizing evidence-based practices to enhance participants literacy leadership skills, and provide ongoing support and coaching to help them successfully implement literacy strategies in their schools. Monitor and evaluate program impact through data analysis, continuously improving the training.

Regional Advisory Committees (RAC) Logistics Support

2023

U.S. Department of Education

Lead Liaison

Coordinate and communicate with committee members, organize and schedule RAC meetings, manage data, and prepare reports.

Engage with committee members to gather input and feedback, support RAC activities, address logistical issues, ensuring the effective operation and alignment of RAC initiatives with project goals.

Career and Technical Education (CTE) Programs of Study Review**2022-2024**

Oregon Department of Education (ODE)

Lead Facilitator

Coordinate with various advisory committees, including educators, industry representatives, and community members, to gather comprehensive feedback on the CTE programs.

Analyze data, compile reports, and provide recommendations for program improvements.

Ensure that the programs align with industry needs and educational goals, fostering collaboration among participants, and supporting the implementation of any suggested changes.

MAST Assessment Review**2023-2024**

Montana Office of Public Instruction

Reviewer

Evaluate test items for alignment with state standards and educational goals, ensuring that the items test items effectively measure the intended learning outcomes in literacy and meet the required educational standards. The process includes reviewing item content for accuracy, appropriateness, and bias, as well as providing feedback and recommendations for revisions.

Evidence-Based Facilitator Guides: Academic Content and Literacy for English Learners**2022**

Idaho Department of Education

Reviewer and Developer

Designed guides to support educators in implementing effective teaching strategies that enhance the academic content and literacy skills of English learners. These guides provide a framework for facilitating professional development sessions, offering practical activities, and delivering instructional techniques grounded in research-based practices.

Professional experience**Education Northwest, Portland, OR/Remote****2022-present**

Principle Consultant, Equitable Learning Systems Improvement

- Provide technical assistance, evaluation, and strategic planning support to states, school districts and higher education institutions
- Lead and manage multiple projects and business development efforts: *multilingual learners, literacy, CTE, proposal writing*
- Support R17 Comprehensive Center federal projects

Florida Department of Education, Tallahassee, FL**2021-2022**

State Regional Literacy Director (SLRD)

- Provided training, technical assistance and support to schools and districts through Implementation Science
- Evaluated schools' improvement plans and district's K-12 comprehensive reading plans
- Provided professional learning on literacy topics (e.g. ELA standards, science of reading, evidence-based practices, improving instruction)

- Supported district and schools with selection and coordinated use of high-quality instructional materials
- Monitored district-, school-, and classroom-level data to provide targeted supports to literacy leadership teams

Seminole County Public Schools, Sanford, FL**2018-2021***Learning Strategist (School Administrator)*

2020-2021

Program Manager, Professional Development Research Partnership (District Admin)

2018-2020

- Supervised Learning Center instruction and staff
- Coordinated schoolwide academic assessments
- Used restorative practices to resolve student conflicts
- Developed strategic plan to increase academic achievement, incorporating Literacy and Project-Based Learning (PBL)
- Collaborated with district leadership in the evaluation and selection of
- academic programs and quality assessments
- Led student services and MTSS teams with an emphasis on interventions, enrichment, and compliance (IDEA, 504, ESSA)
- Built strong family-school relationships as a home-school liaison for
- culturally diverse and multilingual families
- Conducted learning walkthroughs and developed growth opportunities for teachers
- Advised students on college and career readiness
- Managed federal partnership grant between SCPS and Florida Center for Reading Research, FCRR (FSU)
- Increased the number of Content Area Reading credentialed teachers
- Monitored the fidelity of implementation of CAR-PD plan and credentialing process
- Revised CATER-PD to build academic skills in Career and Technical Education (CTE)
- Facilitated the implementation of Reading Endorsement initiative
- Co-developed and reviewed SCPS Reading Endorsement Add-On Program courses
- Collected, analyzed, and disseminated qualitative and quantitative data
- Planned and administered district-wide trainings

Jackson Heights Middle School, Oviedo, FL**2012-2018***Instructional Coach/Reaching Coordinator/Reading Teacher*

- Evaluated as Highly Effective for six consecutive years
- Increased students' reading proficiency scores
- Mentored novice teachers, 100% retention/renewal rate
- Co-developed district-wide Reading Curriculum and K-12 Instructional Plan, 2017
- Organized school-wide Literacy Night, Multicultural Events and Reading Competitions
- Developed, coordinated, and supervised after school program for underserved populations
- Organized and led school-wide initiative, Leading for Success, collaborating with curriculum leaders in the development and monitoring of action plans to increase student achievement
- Developed strategic achievement targets with MTSS team

- Planned and delivered professional development trainings
- Led Equity, Inclusion and Diversity initiatives
- Served as interim Dean of Students

Paterson Public School No. 27, Paterson, NJ

2002-2012

Elementary School Teacher/Reaching Specialist/ESOL

- Consistently increased students’ standards-based scores in reading proficiency for all populations (e.g English Learners)
- Developed strategic Literacy targets and action plans in collaboration with MTSS team
- Mentored novice teachers,100% retention and renewal rate
- Designed and delivered professional development trainings
- Initiated and organized annual Author’s Night, a family engagement initiative
- Led positive behavior plan and positive home-school communication initiative, resulting in reduction of discipline referrals by 31% within first year of implementation

Education

Ed.D. Leadership/Literacy, University of the Cumberlands	2018
M. Ed. Administration, University of West Florida	2016
M.A. Reading, Montclair State University	2011
M. Ed. Leadership & Instruction, The College of New Jersey	2008
B.A. English, William Paterson University	2003

Publications and Presentations

Santana, L. (2024, February). Literacy Leadership for Positive Change. *Oregon Association of Latino Administrators (OALA) Annual Conference*, West Linn, OR

Santana, L. (2024, February). Content Area Reading in Secondary Classrooms. *Oregon Association of Latino Administrators (OALA) Annual Conference*, West Linn, OR

Burdette, J. & **Santana, L.** (2023, July). Leading through Influence: The Power of Connection. National Association of Elementary School Principals (NAESP) Annual Conference. National Harbor, MA

Augustine, W. & **Santana, L.** (2022, March). Literacy Leadership Teams: Planning for Impact. Florida Department of Education Literacy Institute, Virtual Conference.

Santana, L. (2019-2022) Reading Competencies Instructor, Florida Department of Education Reading Endorsement Course, Seminole County Public Schools (SCPS), Florida.

Santana, L. (2019-2021). Career and Technical Education Reading (CATER) course coordinator and instructor, Seminole County Public Schools (SCPS), Florida, FL.

Santana, L. (2019, July). Building Academic Skills in Career and Technical Education. *SCPS Power of You Conference*, Sanford, FL.

Menard, K. & **Santana, L.** (2017, July) Coaching for the Implementation of Learning Stations. *SCPS Power of You Conference*, Sanford, FL

Santana, L. (2015, October). Keynote: A Teacher Story. Gates Foundation *ECET2 Conference*, Orlando, FL

Santana, L. (2015, July) Building Communities of Trust. *SCPS Power of You Conference*, Longwood, FL.

Santana, L. (2008, July) Culturally Responsive Pedagogy. *Paterson Public Schools Summer Conference*. Paterson, NJ

Santana, L. (2008, July) Effective Strategies for English Learners: Writing in the Content Areas. *Paterson Public Schools Summer Conference*. Paterson, NJ

Santana, L. (2002). Almost an A Cup. Racism and Sexism: A Collaborative Study, 2nd Ed.-Reprinted in *Ethnocultural Influences* · Sep 1, 2002

Specialized training and expertise

Certifications:

- State of Florida: Educational Leadership (All Levels) Reading (K-12); ESOL (K-12); English (5-9); Elementary Education (K-6)
- University of Florida: Instructional Coaching
- State of New Jersey: Reading Specialist (K-12) Elementary Education Language Arts/Literacy (5-8)

Skills and Awards:

- Elevating and Celebrating Effective Teaching and Teachers (ECET²) Conference, Featured Teacher, 2015
- School 27's New Jersey, Teacher of the Year, 2012
- *The Herald News* "Golden Apple Award" to outstanding educators, NJ 2008
- Grant Writing: Awarded grant and special funding for tutorial program, *BLA*
- Research: "The Impact of Reading Instruction on Student Achievement"
- Technology: Smartsheet, Learning Management Systems, Google Suite, MS package
- Languages: English and Spanish Language Rater, 2007- present ACTFL, LTI, White Plains, NY

Professional Affiliations:

- Graduate Faculty Scholar, College of Graduate Studies, University of Central Florida (**UCF**)
- Committee Member, Florida Teacher Certification Examinations (FTCE) *FLDOE/Pearson*, 2020, 2016, 2014
- Board Member, Treasurer, Florida Literacy Association (**FLA**)

Memberships:

- Association for Supervision and Curriculum Development (**ASDC**)
- Association for Career & Technical Education (**ACTE**)
- International Literacy Association (**ILA**)
- American Council for the Teaching of Foreign Languages (**ACTFL**)

Jacob Williams, Ph.D.

Proposed Role: Project Lead

Managing Researcher, Applied Research and Evaluation

 | jacob.williams@ednw.org



Dr. Williams has supported SEAs and Schools through Education Northwest, the Northwest Regional Education Lab, and Comprehensive Centers since 2014. From 2021-2024 Dr. Williams served as Co-Director of the R17 Comprehensive Center. Dr. Williams's has key expertise supporting states in carrying out *consolidated state plans* (e.g., supporting school improvement, revision and implementing state academic standards) and is an expert in implementing and sustaining *evidence-based practices and interventions*.

Primary areas of expertise

- Technical assistance for SEA systems improvement
- Strategic improvement through program evaluation
- Special Education
- Classroom instructional support
- Rigorous educational research

Directly related project experience

Region 17 Comprehensive Center

2019–present

US Department of Education | Co-Director

Dr. Williams served as Co-Director of the R17CC. In this role he helped in developing and facilitating capacity building for state departments of education leadership. Example projects include leading states to revise academic standards, supporting strategic planning of SEA program leaders, and designing and implementing school improvement frameworks.

Northwest Regional Comprehensive Center

2014–2019

US Department of Education | Project lead

Williams was a project lead for the Northwest Regional Comprehensive Center, serving AK, WA, OR, ID, and MT. Williams supported projects to increase state capacity to implement initiatives related to ESEA. Examples included supporting the Oregon Department of Education to develop pathways for student learning in secondary math and guiding the Montana Office of Public Instruction to develop strategic plans for federal programs.

Early Indicator and Intervention Systems

2023–present

Oregon Department of Education | Project Lead

Leading the development of training and coaching materials and implementation for evidence-based educational practices focused on Early Indicator and Intervention Systems. Specifically, focusing on increasing student engagement, attendance, and related academic achievement.

Northwest Regional Education Laboratory

2014–2020

US Department of Education, Institute of Education Sciences | Senior Researcher
Leading the development of training and coaching materials and implementation for evidence-based educational practices

Effective Approaches to Reengagement of Young Adults 2020–present

Annie E Casey Foundation | Project lead researcher
A formative evaluation of Youth and Young Adult (YYA) reengagement program models, to gain a clearer picture of the goals, theories of change, and practices being used across a diverse sample of reengagement program efforts and to gain a deeper understanding of the experiences of YYA in these programs.

Montan School Improvement Consultant 2016–2019

Montana Office of Public Instruction | Contract Consultant
Provision of technical assistance to the Rocky Boy School district in Montana to implement their Comprehensive School Improvement Plan.

Professional experience

Education Northwest, Portland, OR 2014–present

Managing Researcher-Applied Research and Systems Improvement

- Deputy Director of the R17 Comprehensive Center
- Provide technical assistance to state education agencies to increase capacity to implement educational initiatives
- Design and deliver technical assistance to school-, district-, and state-level clients on supporting students through differentiated instruction and tiered systems of support
- Conduct rigorous program evaluation

The Meadows Center for Preventing Educational Risk at UT Austin 2008–2014

Deputy Director, Middle School Mattes Institute and Texas Literacy Initiative

- Managed project implementation
- Developed technical assistance tools to facilitate the implementation of evidence-based practices
- Provided onsite technical assistance to school across the United States

Graves County Schools 2004–2008

Special Education Teacher

- Managed the development, implementation, and delivery of Individualized Education Programs for students identified to receive special education services

Education

Ph.D., Special Education Administration, The University of Texas at Austin 2013

M.Ed., Special Education, Murray State University 2007

Publications

- Pyle, N., Flower, A., Williams, J., & Fall, A. (2020). Social Risk Factors of Institutionalized Juvenile Offenders: A Systematic Review, *Journal of Juvenile Justice*, 5, 173–186.
<https://doi.org/10.1007/s40894-019-00120-2>
- Williams, J., & Miciak, J. (2018). Adoption costs associated with processing strengths and weaknesses methods for learning disability identification. *School Psychology Forum*, 12(1), 17-29.
- Greenberg Motamedi, J., Cox, M., Williams, J. & Deussen, T. (2016). *Uncovering Diversity: Examining the Representation of English Learners in Special Education in Washington State*. Portland, OR: Education Northwest, Regional Educational Laboratory Northwest.
- Williams, J.L., Miciak, J., McFarland, L., & Wexler, J. (2016). Learning disability identification criteria and reporting in empirical research: A Review of 2001-2013. *Learning Disabilities Research and Practice*, (31), 221-229.
- Williams, J.L., Pazey, B.P., Fall, A.M., Roberts, G.J., & Yates, J.R. (2015). Avoiding the Threat: An Exploratory Study Into a Theoretical Understanding of the De facto Segregation of Students With Disabilities, *NASSP Bulletin*, 99, 233-253.
- Bryant, D.P., Bryant, B.R., Williams, J.L., Kim, S.A, & Shin, M. (2012). Instructional practices for improving student outcomes in solving arithmetic combination. In D. Chard, B. Cook, & M. Tankersley (Eds.), *Research-based strategies for improving outcomes in academics* (58-69). Boston: Pearson, Inc.

Presentations

- Dwyer, Foust, S., Jone, T, & Williams, J. (2024, February). *Tutoring: The simple but complicated response to lost learning*. Presentation at the annual ESEA conference, Portland, OR.
- Williams, J., McLennan, D., Rooney, K., Fujita-Conrads, E., Frantz, T., Tate-Woodson, T., & Mazzeo, C. (2023, April). *Effective approaches to reengaging young adults*. Presentation at the annual American Educational Research Association conference, Chicago, IL.
- Williams, J., McLennan, D., Rooney, K., Fujita-Conrads, E., Frantz, T., Tate-Woodson, T., & Mazzeo, C. (2023, February). *Effective approaches to reengaging young adults*. Presentation at the annual Reaching At-Promise Students conference, San Diego, CA.
- Dwyer, C., Foust, S., Hoffman, K, & Williams, J. (2023, February). *Increasing velocity and effectiveness: State approaches to learning acceleration*. Presentation at the annual ESEA conference, Indianapolis, IN.
- Williams, J.L. (2019, April). *MTSS in a dual language system: An ongoing journey*. Presentation at the annual Oregon Response to Instruction and Intervention conference, Eugene, OR.
- Williams, J.L. (2017, November). *The board's role in facilitating a system of care for students with severe behavior needs*. Presentation at the annual Oregon School Board Association conference, Portland, OR.

Miciak, J., Fletcher, J.M., McGill, R., & Williams, J.L. (2017, February). *PSW methods for LD identification: An evaluation of evidence*. Presentation at the annual conference for the National Association for School Psychologists, San Antonio, TX.

Williams, J.L. (2017, February). *Building a growth mindset for all in special education*. Presentation at the annual Florida Council for Special Education Administrators, Florida Association of Secondary School Administrators, and Florida Organization of Instructional Leaders collaborative meeting, Orlando, FL.

Specialized training and expertise

- TX K-12 Special Populations teaching certificate
- OR principal certification

Manuel Vazquez Cano

Proposed Role: Project Lead

Managing Researcher, Multilingual Learners

manuel.vazquez@ednw.org



Dr. Manuel Vazquez Cano (he/him/el) is a bilingual, bicultural Latino immigrant, and a Managing Researcher at Education Northwest. Manuel has extensive experience collaborating with state and local education agencies through multi-year, applied research, and technical assistance projects. His expertise focuses on students classified as English learners, college readiness, and educator shortages. Currently, Manuel is working with the Oregon Department of Education to develop a new multilingual learner strategic plan that provides a blueprint for state action to improve learning environments for multilingual learners.

Primary areas of expertise

- Quantitative research design and analysis
- English Learners
- Bilingual education
- College access and postsecondary success
- Program evaluation

Directly related project experience

Oregon State Multilingual Learner Strategic Plan

2023–2024

Oregon Department of Education | Project Lead

Co-lead the development of a strategic plan for multilingual learners in the state of Oregon. To do this, we conducted a thorough landscape scan and needs assessment by gathering feedback from the community through surveys, interviews, and focus groups. Additionally, we analyzed statewide student-level administrative data to identify barriers and opportunities. Finally, our team facilitated multiple workgroup sessions to develop the statewide strategic plan.

Alaska Native English Learners Impact Study

2021

Collaborated with the Alaska Department of Education and Early Development (DEED) and five school districts to conduct an impact study that examines the effect of initial English learner classification on the academic outcomes of Alaska Native students. Findings from the study provided novel evidence on how English learner support impacts Alaska Native students. Results and recommendations were shared with DEED to help improve the support and services that Alaska Native English learners experience.

Office of English Language Acquisition National Professional Development

2016–Present

U.S. Department of Education, Office of English Language Acquisition | Project Lead

Leading the evaluation of an Office of English Language Acquisition (OELA) National Professional Development (NPD) grant at the University of Oregon (2022-2027) and supporting three other NPD grants in Washington state and California. These grants support pre-service and in-service teachers to earn an English for Speakers of Other Languages (ESOL) or other licensure to teach in bilingual settings. The evaluation collects data through participant surveys and focus groups and provides recommendations for continuous improvement and understanding the impact of the grants. We are also conducting impact evaluations of each project, using quasi-experimental design studies designed to

meet What Works Clearinghouse standards with reservations, examining the student-level impacts of participating in each grant.

Beaverton School District EL Research Partnership

2017–2024

Beaverton School District, Multilingual Programs | Co-lead

Support Education Northwest's partnership with Beaverton School District by conducting research to identify the English language development program models that are most effective at improving ELL student educational outcomes (2017-2018) and research to examine the long-term impacts of dual language instruction on student outcomes (2022-2024). Findings were presented to the Beaverton executive cabinet, educators, and at regional conferences. They were used to support the expansion of Beaverton's dual language immersion programs.

National Research & Development Center to Improve Education for Secondary English Learners

2020–2023

University of Oregon College of Education | Quantitative analyst

Supported a national center that works with three state education agencies to investigate course access for secondary English learners. As part of this project, I conducted a review of literature focused on improving course access for secondary English learners and compiled my findings into a published literature review. I also organized and combined multiple data sets to create a comprehensive, longitudinal dataset of Oregon students. Subsequently, I wrote a series of descriptive memos that examined the availability of bilingual education in Oregon, the percentage of teachers who obtain credentials to support English learner-classified students, and the presence of counselors at schools that enroll English learner-classified students.

Evergreen Equity Review

Evergreen School District | Role: Analyst

2020

Supported an equity review for Evergreen Public Schools in Washington state. The review looked at how students from different groups and backgrounds were accessing learning opportunities and achieving outcomes. The results and recommendations were presented to the school board and were used to develop the district's equity planning and initiatives.

Educator Turnover in Alaska

Institute of Educational Sciences | Project lead

2019

Collaborated with a network of Alaska district superintendents to design and conduct an applied research study. The study examined turnover trends for teachers, principals, and superintendents in Alaska, as well as the factors that influence turnover rates. The results from the study were presented to state education leaders, along with policy recommendations aimed at reducing turnover trends.

Newcomer International Transcript Evaluation

2017

Institute of Educational Sciences | Role: Analyst

Supported a qualitative study that intended to understand policies and practices used by districts nationwide related to processing international transcripts of newcomer students and awarding credit for past work. As part of this work, we interviewed eight districts and prepared a report summarizing innovative practices used by sampled districts in the intake process of international transcripts.

Road Map District Use of Level 4 Funding

2016

Institute of Educational Sciences | Role: Project lead

Provided technical assistance to a network of school districts in Washington by conducting an applied qualitative research study. The study examined how districts used funding allocated for recently reclassified English language learners. The results were presented to a network of district leaders and

were meant to support strategies for allocating resources to support recently reclassified English learners.

Professional experience

Education Northwest, Portland, OR 2015–Present

Managing Researcher – Multilingual Learner (January, 2024 - Present)
Principal Researcher – Multilingual Learners (May 2022 – Dec. 2023)
Senior Advisor – Research and Evaluation (November 2018 – April 2022)
Advisor - Research and Evaluation (July 2015 – October 2018)

- Led a portfolio of large mixed-methods research and evaluation projects.
- Provide technical assistance to local and state education agencies specifically focused on multilingual education.
- Conduct descriptive, inferential, and causal statistical analysis.
- Develop and administer data collection instruments and protocols.
- Translate findings into reader-friendly reports and present study findings.

Huntington Learning Center, Ventura, CA 2011–2013

Program Manager (2011-2013)
Assistant Program Manager (2011)

- Managed an after-school supplemental education program that employed 15 individuals and provided academic support to more than 350 students annually.
- Coordinated with five school districts and hundreds of families to deliver impactful services.
- Assessed hundreds of students in math and literacy to develop individualized learning plans.

California Student Opportunity and Access Program, Santa Barbara, CA 2007–2010

Peer Advisor

- Provided culturally responsive mentoring and academic support to underserved high school students to support college enrollment.
- Conducted presentations focused on college access, such as financial aid applications, high school course requirements, and the “hidden curriculum” of college.

Teaching Experience

University of Oregon 2019, 2020, 2023

Lead Instructor, EDLD 632, Educational Policy Analysis
Lead Instructor, EDLD 412; Principles of Management
Teaching Assistant, EDLD 643: Multiple Regression

Columbia University in the City of New York 2015

Teaching Assistant, Applied Peace Building

Oxnard Union High School District 2010-2011

Substitute teacher

Education

Ph.D., Quantitative Research Methods in Education, University of Oregon expected 2024

Master of International Affairs, Economic Development, Columbia University	2015
B.A., Global Studies & Sociology, University of California at Santa Barbara	2010

Publications & Evaluation Reports

- Vazquez Cano, M.**, Greenberg Motamedi J., (2024). Bilingüismo es un superpoder: Exploring the long term results of Beaverton's dual language programs. Portland, OR. Education Northwest.
- Umansky, I. M., **Vazquez Cano, M.**, & Porter, L. M. (2024). Resource for self-determination or perpetuation of linguistic imposition: Effects of English learner classification among Alaska Native students*. Educational Evaluation and Policy Analysis, 46(1), 3-33.
<https://doi.org/10.3102/01623737221144320>
- Vazquez Cano, M.**, Vazquez Baur, A. (2023) On the right path. *Newcomer student enrollment and course placement promising practices*. Next100. <https://thenext100.org/on-the-right-path-newcomer-student-enrollment-and-course-placement-promising-practices/>
- Vazquez Cano, M.**, Roccograndi, A. (2023) Exploring the benefits of applied learning and comprehensive support in alternative high schools. Impact of the PREP intervention. Portland, OR. Education Northwest. <https://files.eric.ed.gov/fulltext/ED632517.pdf>
- Greenberg Motamedi, J., **Vazquez Cano, M.**, Scardina, K., & Johnson, J. (2023). Portland Public Schools' dual language learning environments. Education Northwest.
- Vazquez Cano, M.** (2023) Improving math instruction in bilingual settings. The impact of the MALLI program on student assessment outcomes. Portland, OR. Education Northwest.
- Porter, L., **Vazquez Cano, M.**, Umansky, I. (2023). Bilingual education and America's future: Evidence and pathways. Los Angeles, CA: The Civil Rights Project/Proyecto Derechos Civiles, UCLA.
<https://escholarship.org/content/qt7t494794/qt7t494794.pdf>
- Greenberg Motamedi, J., & **Vazquez Cano, M.** (2022) Oregon State University Teachers Educating All Multilingual Students: Integrating language acquisition and improving outcomes for English learner students. Education Northwest. <https://files.eric.ed.gov/fulltext/ED623673.pdf>
- Vazquez Cano, M.**, Umansky, I. M., Thompson, K. (2021). How state, district, and school levers can improve the course access of students classified as English learners. WestEd National Research and Development Center to Improve Education for Secondary English Learners.
<https://www.elrdcenter.wested.org/improve-course-access-of-els>
- Martinez-Wenzl, M., **Vazquez, M.**, & Yoon, S.Y. (2020). Evergreen Public Schools: Equity audit report. Education Northwest. <https://educationnorthwest.org/sites/default/files/pdf/evergreen-equity-audit-report.pdf>
- Greenberg Motamedi, J., **Vazquez, M.**, Gandhi, E. V., & Holmgren, M. (2019). Beaverton School District English language development minutes, models, and outcomes. Portland, OR: Education Northwest.
<https://educationnorthwest.org/sites/default/files/resources/beaverton-minutes-models-outcomes-report.pdf>
- Vazquez Cano, M.**, Bel Hadj Amor, H., & Pierson, A. (2019) Educator retention and turnover under the midnight sun: Examining trends and relationships in teacher, principal, and superintendent movement in Alaska. Portland, OR: Education Northwest, Regional Educational Laboratory Northwest. <https://eric.ed.gov/?q=ED598351>

- Martinez-Wenzl, M., Greenberg Motamed, J., **Vazquez, M.**, & Blackburn, T. (2019). Quality teaching for English learners implementation evaluation. Portland, OR: Education Northwest.
- Hanson, H., Stevens, D., **Vazquez, M.**, Roberts, B. (2018) Preparing Alaskans for mining careers through short, industry-informed training Programs: University of Alaska round IV TAACCCT grant. Portland, OR: Education Northwest
http://www.skillscommons.org/bitstream/handle/taaccct/18578/AK_TAACCCT_Report_093018.pdf?sequence=1&isAllowed=y
- Hodara, M., Petrokubi, J., Pierson, A., **Vazquez, M.**, & Yoon, S. Y. (2017). Fulfilling the promise? Early findings on Oregon's new college grant program. Portland, OR: Education Northwest.
<http://educationnorthwest.org/resources/early-findings-oregon-s-new-college-grant-program>

Selected Presentations

- Vazquez Cano, M.** (2024) Bilingual Education and America's future: Evidence and pathways. Capitol Hill Research and Policy Briefing: A Civil Rights Agenda for the Next Quarter Century. UCLA Civil Rights Project/Proyecto Derechos Civiles
- Vazquez Cano, M.** (2024). Bilingüismo es un superpoder: Exploring the long term results of Beaverton's dual language programs. Presentation at the American Education Finance and Policy Conference
- Greenberg Motamed, J., **Vazquez Cano, M.**, Scardina, K., & Maurizio, T. (2023). The long-term impacts of Beaverton's dual language immersion program. Presentation at the Annual Confederation of Oregon School Administrators English Learners Alliance Conference. Eugene, OR.
- Vazquez Cano, M.** (2023) Honoring newcomer students' prior learning experiences. Presentation at the National Association of Bilingual Educators Conference. Portland, OR.
- Porter, L., **Vazquez Cano, M.**, Umansky, I. (2023) The case for bilingual education: Evidence and pathways. Presentation at the National Association of Bilingual Educators Conference. Portland, OR.
- Vazquez Cano, M.**, Legters, N. (2023) Supercharging alternative high schools. Implementation and impact evaluation of the PREP intervention. Paper Presentation at the American Education Research Association Annual Conference. Chicago, IL
- Vazquez Cano, M.**, Umansky, I., Thompson, K. (2022) Malleable levers to improve secondary English learner-classified students' access to English language arts and math. Presentation at the Society for Research on Educational Effectiveness Conference. Arlington, VA.
- Greenberg Motamed, J. & **Vazquez Cano, M.** (2022) Registering and Enrolling Refugee and Immigrant Students in Secondary Schools. National Clearinghouse for English Language Acquisition Webinar.
<https://ncela.ed.gov/Webinars>
- Vazquez Cano, M.** (2022). Resource for self-determination or perpetuation of linguistic imposition. Paper Presentation at the American Education Research Association Annual Conference. San Diego, CA
- Vazquez Cano, M.** (2022). Advise and deliver. The relationship between counselor caseload and college readiness opportunities for secondary English learners. Poster presentation at the American Education Finance and Policy Conference, Denver, CO.
- Martinez-Wenzl, M., **Vazquez Cano, M.** (2020). Evergreen Public Schools: Equity audit report. Presentation to the Evergreen School Board.

Vazquez Cano, M (2020). Trends in Oregon Latinx students. Virtual presentation at Oregon State University. <https://academicaffairs.oregonstate.edu/webinar-presentation-trends-oregon-latinx-students>

Vazquez Cano, M. (2019). Educator turnover in Alaska. Presentation at the American Education Research Association Annual Conference. Toronto, Canada

Greenberg-Motamedi, J., **Vazquez Cano, M.** (2019). A Multi-Year Study on EL Program Model Impact on Student Achievement. Presentation at the Confederation of Oregon School Administrator' State English Learners Alliance Conference, Eugene, OR

Vazquez, M., Bates, L., Scott, C. (2018). Identifying beating-the-odds schools in a single district. Poster presentation at the American Education Finance and Policy Conference, Portland, OR.

Martinez-Wenzl, M. **Vazquez, M.** (2017). Credit where credit is due: Interpreting newcomers' foreign transcripts. Poster presentation at the annual meeting of the American Educational Research Association, San Antonio, TX

Vazquez, M., Palomeque, D. (2016) Listos para el kinder evaluation. Presentation at the annual Oregon Association of Bilingual Educators. Portland, OR

Specialized training and expertise

- Languages: Spanish (Native), Portuguese (Proficient)
- Data analysis software: R, Stata, Tableau, ArcGIS
- Quantitative Research Design
- Multilingual Education Policy

Other professional activities

- Candidate reviewer for the [Next100](#) (2023)
- MENTE Summit Presenter (2017, 2019)
- Member of the Equity Action Team at Education Northwest (2017 - 2021)
- Member: AERA, AEFPP

Jennifer Johnson

Proposed Role: Project Lead

Principal Consultant, Equitable Learning and Systems Improvement

 | jennifer.johnson@ednw.org



Primary areas of expertise

- Multilingual learner education
- Instructional leadership
- Strategic planning for school improvement
- Equitable learning environments
- Multi-tiered systems of support

Directly related project experience

Multilingual Learner and Title/LAP Program Evaluation

North Thurston Public Schools | Project Lead

Leading the evaluation of services and programming for students receiving multilingual learner services and Title/LAP intervention services. Project includes data analysis, classroom observation, and community engagement.

Washington Statewide Family Engagement Center (WASFEC)

Washington State | Communities of Practice Lead

Supporting school districts in Washington with implementation of family and community engagement practices through partnership with OSPI and statewide non-profit partners.

Professional experience

Education Northwest, Portland, Oregon

2022–present

Senior Advisor, Equitable Learning and Systems Improvement

- Lead and coordinate technical assistance projects serving local education agencies nationwide, with concentrated regional presence in Washington and Oregon.
- Collaborate and foster strong relationships with clients in support of equitable learning systems in the areas of instructional leadership, culturally responsive practices, school improvement, and services for multilingual learners.

Burlington-Edison School District, Burlington, Washington

2020–2022

Principal, West View Elementary School

- Set vision and mission for dual language education and culturally responsive instruction in a Title I school serving a primarily Latinx student population grades PK–6.
- Led instructional leadership team and developed and implemented school improvement plan.
- Led all building teams and services including Positive Behavioral Interventions and Supports (PBIS), Multi-Tiered Systems of Support (MTSS), early childhood services, Title/LAP services, and special education.
- District equity team member.

Office of Superintendent of Public Instruction, Olympia, Washington

2021

WIDA Trainer for Administrators and Superintendents

- Facilitated initial WIDA training for administrators and superintendents in preparation for Washington joining the WIDA consortium and implementing new English language proficiency standards.
- Collaboratively revised state training materials.

Bellevue School District, Bellevue, Washington**2015–2020***Director of Programs for Multilingual Learners, Bellevue, Washington**Assistant Principal, Sherwood Forest Elementary School*

- Coordinated services for 4500 multilingual students across 29 schools K–12, including Title III Native American program services.
- Served as a leadership member on district assessment and data, literacy, equity, and school improvement teams.
- Evaluated and mentored 45 EL certificated teachers and designed and delivered district-wide professional learning on best practices for multilingual learners.
- Managed all department hiring, budgets, and federal grant writing.

Southside School District, Shelton, Washington**2007–2008***Language Acquisition Consultant*

- Observed classroom teachers and provided coaching on strategies for language learners.
- Assessed student learning needs and delivered individualized instruction.

Shelton School District, Shelton, Washington**1999–2015***Bilingual Instructional Coach**Dual Language Teacher*

- Led school-wide integrated unit planning using backward design principles.
- Mentored teachers and demonstrated instructional techniques and strategies.
- Served as assessment coordinator.
- Facilitated data analysis sessions.
- Provided technology and curriculum support.
- Taught multiple grade levels and served as a Title I bilingual reading specialist and interventionist.

Education and certification

Post M.A., Educational Leadership, Seattle Pacific University	2015
M.A., Human Development, Pacific Oaks College	2012
B.A., Spanish/Political Science, University of Washington	1997
Administrator Certificate	2015
Initial Teaching Certificate, State of Washington	1999
Continuing Teaching Certificate, State of Washington	2004
Endorsements: P-3, K-8, K-12 ESL, K-12 Bilingual Education, K-12 Spanish, 4-12 Political Science	

Presentations

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- Johnson, J., Brito, A., Finnegan, P., Strunk, K., Wisner, R. (2018, March). *Closing the Opportunity Gap with Dual Language Education*. Presented at Washington Association of Bilingual Education annual conference, Bellevue, WA.
- Johnson, J. & LaMare, H. (2019, November). *Conversations for Dual Language Leadership*. Presented at La Cosecha annual conference, Santa Fe, NM.

- Johnson, J. (2019, December). *Assessment and Accountability for Two-Way Dual Language*. Presented at Washington Educational Research Association annual conference, Seattle, WA.
- Johnson, J. & LaMare, H. (2022, January). *Using the Guiding Principles for Planning*. Presented at Washington Association of Bilingual Education winter institute, Seattle, WA.
- Johnson, J. & Scardina, K. (2022, November). *Family and Caregiver Activities for Multilingual Learners*. Presented at La Cosecha annual conference, Santa Fe, NM.
- Johnson, J. & LaMare, H. (2023, February). *Planning for Integrated and Cohesive Learning for Multilingual Learners*. Presented at National Association of Bilingual Education, Portland, OR.
- Johnson, J. & Percy-Calaff, K. (2023, November). *Washington State: Starting Strong and Expanding Dual Language to Reach All Students*. Presented at La Cosecha annual conference, Albuquerque, NM.
- Johnson, J. & LaMare, H. (2023, November). *Data Use as An Act of Social Justice*. Presented at La Cosecha annual conference, Albuquerque, NM.

Other professional activities

- Member, Washington State Office of Superintendent Dual Language Task Force and Steering Committee
- Member, Washington Association of Bilingual Education
- Member, National Association of Elementary School Principals
- Contributor, *2023 Dual Language Report: How Washington Can Become a Quality Dual Language State*, OneAmerica

Specialized training and expertise

- Bilingual/Biliterate
- Guided Language Acquisition Design (GLAD)
- Sheltered Instruction Observation Protocol (SIOP)
- WIDA Language Proficiency Standards
- Beyond Diversity, Pacific Education Group
- Leading Dual Language Programs for Student Success, Center for Applied Linguistics
- Building Equity for English Learners in the Content Areas, Leading with Learning

Catherine Barbour

Proposed Role: Quality Assurance

Senior Director, Equitable Learning and Systems Improvement

 | catherine.barbour@ednw.org



Experienced School Turnaround Leadership/school improvement consultant with a demonstrated history of working at the federal, state, and local level focused on improving access and opportunity for students. Skilled in developing leadership programs, leadership coaching, school improvement systems, education policy, organizational change, building networks, and collaboratives.

Primary areas of expertise

- Technical assistance for SEA systems improvement
- School Improvement evidenced based practices
- Leadership training and coaching
- Implementation support and monitoring
- Project management

Directly related project experience

Region 17 Comprehensive Center

2021–present

U.S. Department of Education, Office of Elementary and Secondary Education |

Role: Quality Assurance

Oversees technical assistance projects providing quality assurance on overall management, tools and products, and dissemination.

Equitable Learning and Systems Improvement

2021–present

Education Northwest

Role: Senior Director Equitable Learning and Systems Improvement

Leads program area focused on providing technical assistance support to states and school districts on a range of school improvement areas from English language learners, Native and Indigenous learners, equity audits, and school leadership training and coaching including the Learning Development and Design team that develops online learning modules and provides instructional design support.

American Institutes for Research

2010–2021

Role: Managing Director District and School Improvement Center

Led school turnaround/improvement services and project teams in the design and development of products and services to support states, districts, and schools in their improvement efforts, specifically in school turnaround and transformation leading to schools exiting out of improvement status. Provided consulting to states, districts, and schools for designing, implementing, and evaluating school reform initiatives. Led the State Support Network; federally funded technical assistance network designed to provide support to states implementing Every Student Succeeds Act (ESSA). Developed supports for School Turnaround, Turnaround Leadership Coaching, Leadership for Equity, and Instructional Coaching that included professional development curriculums, coaching, and training services. Managed multiple school improvement teams working across states and districts providing school improvement services with a focus on consistency of practice and fidelity to the school improvement model. Generated state

and district level clients across New York, Hawaii, Virginia, Illinois, Arizona, Michigan, and Wisconsin in rural, urban, and suburban school districts.
respect to school improvement.

TeachFirst, Seattle, Washington

2007–2010

Role: Senior Consultant

Developed district-specific implementation plans for TeachFirst professional learning communities (PLCs) model with metrics and outcome targets working with Central Office designated personnel; delivered training sessions for all levels of implementation of TeachFirst professional learning communities model to district school team; partnered with Content Development Team to write training curriculum; provided consulting services for more than 35 school teams to support implementation of PLCs model, identify potential teacher leaders to form instructional leadership teams, identify and prioritize student learning needs based on analyzing student data, identify TeachFirst resources to enhance teacher professional development needs, and problem solve potential implementation issues; and conducted quarterly implementation progress analysis meetings with school district implementation leaders.

School Turnaround, Rensselaerville, New York

2006–2007

Role: Senior Consultant

Provided executive coaching to seven elementary principals; coaching for one of these principals resulted in Florida Comprehensive Assessment Test student achievement scores that changed an elementary school in Polk County from an *F* school to an *A* school. Managed three-member specialist team to serve large central Florida school district consisting of 11 elementary and three middle schools; coordinated and hosted quarterly web conferences for participating principals from four different states; conducted marketing campaign in Florida, resulting in adding 16 schools to full program and 11 schools to readiness program; trained school teams in effective turnaround school strategies; and facilitated midyear and final assessment conferences for participating principals and school teams.

Professional experience

Education Northwest

2021–present

Senior Director

American Institutes for Research

2010–2021

Managing Director

2019–2021

Principal Consultant

2014–2019

Senior Consultant

2010–2013

TeachFirst

2007–2010

Senior Consultant

Principal

1999–2006

Berkely Elementary

2004–2006

Rawls Byrd Elementary

2005–2006

John Tyler Elementary

1999–2005

Education

M.Ed., Elementary Administration, The College of William and Mary

1997

B.A., Elementary Education, Christopher Newport University

1983

Publications

- Baldwin, M., Barbour, C., Columbi, G., Espinoza, A., Irby, M., Lachlan, L., Meyer, C., Karageorge, T., & Williamson, S., (2019). *Implementation Continuum for the Systemic Improvement Framework*. Washington, DC: American Institutes for Research.
- Barbour, C., Dwyer, K., Osher, D., (2018). Leading, Coordinating, and Managing for Equity with Excellence. In Osher, D., Moroney, D., & Williamson, S. (Eds) *Creating Safe, Equitable, Engaging Schools: A Comprehensive Evidence-Based Approach to Supporting Students*. (pp. 25–35) Cambridge, Massachusetts, Harvard Education Press
- Barbour, C., La Turner, J., Osher, D., (2018). Guiding and Planning Improvement for Equity with Excellence. In Osher, D., Moroney, D., & Williamson, S. (Eds) *Creating Safe, Equitable, Engaging Schools: A Comprehensive Evidence-Based Approach to Supporting Students*. (pp. 35–51) Cambridge, Massachusetts, Harvard Education Press
- Barbour, C., Butler, A., & Le Floch, K. (2017). Everything But the Kitchen Sink: How an Abundance of Concurrent Efforts Thwarts School Improvement. In Meyers, C. & Darwin, M. (Eds). *Enduring Myths That Inhibit School Turnaround*. (pp. 95–110). Charlotte, North Carolina: Information Age Publishing
- Barbour, C., Garcia, A., & Le Floch, K., (2016). Want to Improve Low Performing Schools? Focus on the Adults. Education Policy Center at American Institutes for Research
- Barbour, C., & Le Floch, K., (2014). *Working Together: Building Effective School Turnaround Partnerships*. American Institutes for Research

Presentations

- Barbour, C. & Nariman, J. (2018, November). Equity Driven Leadership. Presentation given at Turnaround for Talent Conference hosted by West Comprehensive Center and Center for Great Teachers and Leaders. Washington, D.C.
- Barbour, C. (2016, February). Turnaround Leadership Development. Presentation given at West Comprehensive Center, REL West, and Center for Great Teachers and Leaders: Educator Effectiveness: What's Ahead?, Scottsdale, Arizona.
- Barbour, C. (2016, April). Principals Using Teacher Effectiveness Data to Make Key Workforce Decisions. Training conducted for West Comprehensive Center, REL West, Center for Great Teachers and Leaders. Scottsdale, Arizona.
- Barbour, C. (2016, April). Working with Schools Leaders to Implement Your I3 Project. Webinar presented for School Climate/Social Emotional Learning and the Teacher and Leadership Effectiveness Communities.
- Barbour, C. (2016, May). Human Talent Management. Presentation given at Project Elevate Conference for Arizona Department of Education. Scottsdale, Arizona
- Barbour, C. (2016, May). Teaching Conditions. Presentation given at Project Elevate Conference for Arizona Department of Education. Scottsdale, Arizona
- Barbour, C. (2016, July). Teaching Conditions. Presentation given at Talent for Turnaround Conference hosted by West Comprehensive Center and Center for Great Teachers and Leaders. Houston, Texas.
- Barbour, C., & Cannata, M. (2015, March). Principals use of teacher effectiveness data for talent management decisions. Presentation given at West Comprehensive Center: Measuring Educator Effectiveness: Data-Driven Talent Management for Continuous Improvement, Salt Lake City, UT.

- Barbour, C. (2015, March). Five Key Foundational Pillars for Building an Effective Coaching Model. Presentation given at Summit VI: Designing Comprehensive Evaluation Systems: Leading the Design and Implementation of a Comprehensive System To Improve Teaching and Learning, Scottsdale, AZ.
- Barbour, C. (2015, February). Recruitment and retention of turnaround leaders. Presentation given at Council of Chief State School Officers/Center on Great Teachers and Leaders Topical Meeting on Equitable Access to Excellent Teachers and Leaders, San Diego, CA.
- Barbour, C., & Sherrat, E. (2015, February). Transforming professional learning through the use of educator evaluation Data. Presentation given at National Title One Conference, Salt Lake City, UT.
- Barbour, C., Norris, D., O'Day, J., Wohlstetter, P., & Carlson Le Floch, K. (2014, April). Persistent challenges in turning around persistent low performance. Moderated panel at the annual meeting of the American Educational Research Association, Philadelphia, PA.
- Barbour, C. (2014, March). Increasing reading achievement through instructional coaching. Presentation given at Virginia State Reading Association 47th Annual Conference, Roanoke, VA.
- Barbour, C., & LeFloch, K. (2013, December). Grounding research and practice: What works in turning around low-performing schools. Presentation given at National Conference of State Legislatures: Turning Around Low-Performing Schools: A State Legislative Perspective Conference, Washington, DC.
- Barbour, C. (2010, October). Five pillars of implementing an effective instructional coaching model. Presentation given at Ohio Race to the Top Conference hosted by the Ohio Department of Education, Columbus, Ohio.
- Barbour, C. J. (2009, December). Turning around school literacy: The Berkeley Elementary story. Presentation given at Leading for Literacy 2009 Administrators Institute, hosted by Lesley University Center for Reading Recovery and Literacy Collaborative, Providence, Rhode Island.

Specialized training and expertise

- Turnaround Specialist Credential in School Turnaround Leadership, University of Virginia Darden School of Business & Curry School of Education

Elizabeth Vale Gandhi

Proposed Role: Internal Evaluator and

Engagement/Outreach Co-Lead

Managing Researcher, Applied Research and Evaluation

elizabeth.gandhi@ednw.org



Elizabeth Gandhi is a managing researcher at Education Northwest who resides in San Diego, California, with multiple years of experience in research and evaluation. She holds a Ph.D. in Applied Developmental Psychology and Systems Science from Portland State University, a Masters in Human Development and Family Studies from Oregon State University, and a B.S. in Psychology from Lewis and Clark College. She has expertise in all phases of research and evaluation including research and evaluation design; survey design; data collection methods including classroom observations, interviewing, surveying, and focus groups; qualitative and quantitative research methods; project management; and reporting. She is currently leading the internal evaluation of the Region 17 Comprehensive Center, a system-wide evaluation of the California Learning Acceleration Grant, an evaluation of the Children's Institute Early School Success program implemented in Oregon districts and schools, co-leading an evaluation with the subcontractor American Institutes for Research to examine how programs differentiate best practices to meet the cultural, linguistic, and learning needs of children enrolled in Seattle Preschool Program's (SPP) Dual Language Initiative and inclusive special education classrooms and family childcare programs, and co-leading a research practice partnership with Pacific University in Oregon on the National Science Foundation-funded project Understanding Noyce Scholar Career Trajectories: What Keeps Noyce Scholars Going?

Primary areas of expertise

- Pre-K-12 Applied Program Evaluation
- Project Leadership
- Mixed Methods Data Collection, Analysis, and Reporting

Directly related project experience

Children's Institute Early School Success Evaluation

2024-present

Children's Institute | Role: Project Lead

Leading an evaluation to examine how the Early School Success initiative is implemented in districts and schools. This includes consideration of how key informants view the initiative's benefits for student engagement, systemic change, coordinated district efforts, and alignment of instruction and classroom strategies. The evaluation uses mixed methods, drew on available quantitative data, and incorporated newly collected data to answer questions about Early School Success' implementation and scaling strategies.

Seattle Preschool Program Process Evaluation

2024-present

Seattle Department of Education and Early Learning | Role: Co-project Lead

Co-leading an evaluation with the subcontractor American Institutes for Research to examine how programs differentiate best practices to meet the cultural, linguistic, and learning needs of children enrolled in Seattle Preschool Program's (SPP) Dual Language Initiative and inclusive special education

classrooms and family childcare programs. The mixed-methods evaluation uses a case study approach to describe and compare implementation and practices in nine classrooms with different levels of implementation fidelity. We will prepare a technical report, community-facing brief, and four presentation slide decks to report findings and recommendations to department staff members, providers, families, and the broader community.

California Learning Acceleration System Grant Evaluation

2022-present

California Collaborative for Educational Excellence | Role: Project Lead

Leading an evaluation of the California Learning Acceleration System Grant program with the subcontractor Social Policy Research Associates. The evaluation will support the California Collaborative for Educational Excellence in evaluating and making system-wide recommendations regarding professional learning opportunities to support learning acceleration for the state's diverse student population, particularly in math, literacy, and language development. Our mixed-methods evaluation includes three phases: planning, formative, and summative. Over five years, we will develop a logic model, survey instructional leaders, conduct interviews with program participants, review documents, conduct professional development observations, and analyze administrative data.

Counties for Career Success Evaluation

2022-present

National Association of Counties Research Foundation | Role: Project Lead

Leading a project partnering with The National Association of Counties Research Foundation (NACoRF), the education, technical assistance, and research arm of the National Association of Counties, which is a bipartisan, non-profit membership association that brings together and elevates the leadership of county governments to achieve healthy, vibrant and safe communities across the nation. Education Northwest has been engaged to develop a logic model that will outline a set of interventions and strategies for promoting cross-systems collaboration and postsecondary education attainment among older youth and adults and help NACoRF assess the progress of each county team in promoting the postsecondary education attainment among low-income and underserved students.

Understanding Noyce Scholar Career Trajectories

2022-present

National Science Foundation | Role: Project Co-Lead

Co-leading a research practice partnership with Pacific University on the National Science Foundation-funded project Understanding Noyce Scholar Career Trajectories: What Keeps Noyce Scholars Going? This project is designed to generate knowledge about the effectiveness and retention of Oregon Noyce scholars who entered STEM teaching by surveying 100 Noyce scholar alumni, conducting in-depth interviews with 40 alumni, and engaging a sample of Noyce scholars in year-long narrative inquiry groups. We will also use journals, other archival data, and participant observations.

Reynolds School District Program Review

2022-2023

Reynolds School District | Role: Evaluator

Part of a team conducting a program review to help Reynolds School District leadership understand how to scale or improve early learning programs to address gaps in service, meet quality standards, streamline and coordinate service delivery, and position the district to access or apply for additional funding to support preschool expansion. In partnership with district leadership, we are collecting existing documents, conducting literature and document reviews, key informant interviews, focus groups, and analyses of new and existing pre-K program data. Based on evaluation findings and advisory committee feedback, we will share recommendations in a final report and a presentation to the school board.

Language, Culture, and Knowledge-building through Science (LaCuKnoS) Evaluation

2021-present

Oregon State University | Role: Project Lead

Education Northwest is partnering with Oregon State University (OSU) to support the Language, culture, and knowledge-building through science (LaCuKnoS) project, funded by the National Science Foundation through ongoing technical assistance and evaluation services. Throughout the grant, Education Northwest will provide ongoing formative feedback to the project team and create annual memos summarizing findings and recommendations for project leadership. A summative evaluation report will be provided near the end of the project reviewing evaluation findings and highlighting impact findings.

Wyoming Preschool Development Grant Evaluation

2020-2024

Align | Role: Project Lead

Leading an evaluation of Wyoming's Preschool Development Birth Through Five Grant (PDG B-5) from the federal Department of Health and Human Services (DHHS). Education Northwest is supporting Align, the lead agency implementing the grant, as an evaluation partner for the duration of its grant, working closely with Align staff members to ensure the evaluation meets the state's needs and addresses grant priorities. The evaluation provides valuable information throughout the grant for the Wyoming PDG B-5 team regarding progress towards project goals to help the team make program and policy decisions regarding expanding high-quality ECE in the state.

Region 17 Comprehensive Center Evaluation

2020-present

U.S. Department of Education | Role: Lead Internal Evaluator

Serving as the lead internal evaluator of the Region 17 Comprehensive Center which is providing intensive, targeted, and universal technical assistance to stakeholders in Idaho and Montana over five years to build their capacity to implement evidence-based practices and use data to inform decision-making on projects. We are conducting a formative and summative evaluation over the life of the cooperative agreement to help internal technical assistance staff utilize data and evidence in their ongoing work, and to report on progress toward performance measures and outcomes to the U.S. Department of Education.

Seattle Preschool Program Evaluation

2021-2024

Seattle Department of Education and Early Learning | Role: Qualitative Lead

Serving as the qualitative lead on a three-phase mixed-methods evaluation of the Seattle Preschool Program. Key activities include collecting and analyzing data from family, teacher, and director surveys, observations, and interviews, as well as data from administrative sources such as child-level assessments. Additionally, we are engaging providers and families through an advisory committee and listening sessions and working with the advisory committee to draft a logic model to ground the evaluation.

Professional experience

Education Northwest, Portland, Oregon

2014-present

Managing Researcher, Applied Research and Evaluation

RMC Research Corporation, Portland, Oregon

2006-2013

Research Associate

Education Northwest (Formerly the Regional Education Laboratory)

2004-2006

Evaluation Associate

Regional Research Institute, Portland, Oregon

2001

Research Assistant

NPC Research, Portland, Oregon

2000-2001

Research Assistant

Portland State University, Portland, Oregon
Research Assistant

1999-2006

Child Development Center, Corvallis, Oregon
Head Start Family Outreach Coordinator

1997-1999

Education

Ph.D., Applied Developmental Psychology and Systems Science, Portland State University, Portland, Oregon	2006
M.S., Human Development and Family Studies, Oregon State University, Corvallis, Oregon	1999
B.S., Psychology, Lewis and Clark College, Portland, Oregon	1996

Publications

Gandhi, E.V., Roccograndi, A., Brey, L., & Maller, R. (2024). Wyoming Preschool Development Grant Birth Through Five (PDG B–5) Renewal Grant: Program Performance Evaluation Plan Year 3 Report. Portland, OR: Education Northwest.

Paulsen, C.A. & Gandhi, E.V. (2023). Region 17 Comprehensive Center: Year 4 Annual Evaluation Report. Portland, OR: Education Northwest.

Andersson, J., Sitzman, D., Arneson, A., & Gandhi, E. (2021). *With New Science Standards, Coaching is Key*. The Learning Professional: The Learning Forward Journal.

Gandhi, E. V., & Roccograndi, A. (2021). Wyoming Preschool Development Grant Birth Through Five (PDG B–5) Initial Grant: Evaluation Report. Portland, OR: Education Northwest.

Gandhi, E.V., Helsel, F.I., Klute, M., Bates, L., Nagel, A., Van Dine, D., & Tedeschi, S. (2018). Oregon Learning Hubs System Evaluation: Final Report. Portland, OR: Education Northwest.

Presentations

Gandhi, E.V., Scott, C., & Dillman, L.M. (2017). *Making the most of professional development: How teacher-led professional development influences teaching practices*. Paper presented at the 84th Annual Educational Research Association Meeting, San Antonio, TX.

Helsel, F. K., & Gandhi, E. V. (2015, December). *What do elementary school administrators need to know to ready their schools for incoming kindergarteners?* Roundtable presented at the annual conference of the Washington Educational Research Association, Seattle, WA.

Gandhi, E., Speth, T., Nishioka, V., & Copland, C. (2020, September). *Oregon Association of Relief Nurseries (OARN) training: Using logic models and the plan-do-study-act cycle of continuous improvement*. REL Northwest virtual training, Portland, OR.

Gandhi, E., Speth, T., Nishioka, V., & Copland, C. (2020, September). *Oregon Association of Relief Nurseries (OARN) training on using data policies and procedures to promote quality services: Data quality, informed consent, and data security*. REL Northwest virtual training, Portland, OR.

Michelle Galley

Proposed Role: Engagement/Outreach Co-Lead

Project Director, FHI 360

@fhi360.org

Michelle Galley has more than a decade of experience directing communications efforts for large multinational development organizations. She has proven skills in developing organizational and business-specific communications strategies, guiding re-branding initiatives, and leading crisis communications. Ms. Galley excels in directing and overseeing project strategy, maintaining relationships with internal and external stakeholders, and managing a team of communications professionals and education subject matter experts. She also brings decades of experience writing and editing curriculum and educational materials, print publications, websites, and social media as well as coordinating the dissemination of information. As a Project Director for FHI 360's U.S. Education Department and larger U.S. Business unit, she has designed communications strategies and overseen the creation of deliverable materials on a range of topics including equity, financial literacy, college and career readiness, teacher leadership, early childhood education, COVID-19 response, American Indian and Alaska Native education, workforce development, justice-involved youth, and positive youth development.

Primary areas of expertise

- Communications strategy and planning
- Dissemination
- Authentic engagement with parents
- Partnership development
- Curriculum design
- Publications design
- Writing and copyediting

Directly related project experience

District Summer Learning Network (DSLNL)

2021–Present

Wallace Foundation |

Role: Communications lead

DSLNL has worked with more than 100 school districts to redesign their summer programs so they focus on evidence-based practices, equity, whole child development, and strong district-community partnerships. These visions are captured in a three-year summer learning roadmap. State education agencies have joined DSLNL to work on creating summer learning models and policies that promote strong and sustainable summer learning programs for all schools in their states. Through this effort, DSLNL aims to accelerate learning and foster well-being for participating students — especially those from historically marginalized communities. Ms. Galley led project communications with start-up and oversaw communications within the network of districts and SEAs, and externally to national and local education organizations through fall 2023. She currently provides strategic oversight and guidance for the project's communications efforts.

Consumer Finance Protection Bureau BPA

2017–2022

US Consumer Financial Protection Bureau (CFPB) |

Role: Curriculum lead

FHI 360 led the Consumer Financial Protection Bureau (CFPB)-funded Teaching Digital Platform BPA (2017-2022), helping the bureau plan, build, launch, grow, and promote the Youth Financial Education area of its website. Ms. Galley led the team who developed teaching guides, 275 activities for teachers and families, web-based youth financial capability surveys, and other outreach and promotion materials. To better understand audience needs and perspectives, the team facilitated formal focus groups and informal user testing with teachers, students, parents, and caregivers, and used feedback to make activities and resources clearer, more inclusive, and more engaging. The resources were designed to be easy-to-access and relevant for diverse communities (e.g., urban, rural, low income, English language learners) and align with federal plain language guidelines. As a result of FHI 360's outreach and promotion support for the website, site usage and the number of materials downloaded increased by over 50% in one year.

Connected & Engaged

2020–2023

Bill and Melinda Gates Foundation |

Role: Communications and content lead

For the Connected & Engaged project, Ms. Galley oversaw the design and development of a suite of resources for teachers and school and district leaders. Starting early in the COVID-19 pandemic, the team created a guide to best practices for remote and hybrid instruction. Then, in 2021–2022, the team developed resources on strategies to help manage the return to in-person instruction, including reconnecting and reigniting instruction. In 2023, the project pivoted to another critical issue: family engagement. The materials we developed provide practitioners with research-based strategies and resources for customizing and adapting best practices and lessons learned in their own communities. We also created a set of practice and policy briefs, profiles of four districts demonstrating exemplary strategies, videos highlighting solutions in action and a library of additional resources.

Professional experience

FHI 360

2011–2013, 2019–Present

Project Director, U.S. Education

2021–Present

Technical Advisor, U.S. Education

2019–2021

Associate Director, Sector Communications

2011–2013

Maven Communications, LLC

2014–2018

Principal

U.S. Interagency Council on Homelessness (USICH)

2013–2014

Director of Communications and External Affairs

Academy for Educational Development (AED),

2004–2011

Director of Communications

2011

Manager, Publications and Media Relations

2008–2011

Senior Writer

2004–2004

Education Week

1997–2004

Staff Writer

Education

BA, English, Communications Media Minor, State University of New York College at Fredonia

1992

Christine Andrews, Ph.D.

Proposed Role: External Evaluator

Concord Evaluation Group, Inc.

 | christine@concordevaluation.com

Concord Evaluation Group (CEG) is a woman-owned, small business that provides its clients (local, state, and private educational organizations) with program evaluation support. Dr. Andrews is responsible for supervising all researchers and consultants; managing budgets and timelines; conceptualizing studies; developing study instruments; data collection; qualitative analyses, descriptive and inferential statistical analyses; report writing; and presenting research findings at client meetings, professional conferences, and in peer-reviewed journals.

Primary areas of expertise

- Program evaluation
- Formative research
- Summative research
- Educational evaluation

Directly related project experience

Evaluation of Regional 17 Comprehensive Center

2019-2024

Concord Evaluation Group |

Roles: Evaluator

Served as the external evaluator, working collaboratively with, but independently from, the internal evaluator. Designed evaluation plans and instruments that enabled the team to collect formative and summative data for both continuous improvement purposes as well as reporting on progress towards outcomes. Analyzed data and delivered regular reports to ED.

Evaluation of Education Northwest (Regional Education Laboratory)

2012-2021

Concord Evaluation Group |

Roles: Evaluator

Served as the external evaluator for the REL. Designed evaluation plans and instruments, collected data from REL stakeholders, analyzed data, and reported on progress towards outcomes.

Evaluation of a Boston Children's Museum Initiative to Train Staff in Culturally Responsive and Inclusive Audience Research

2023-2024

Concord Evaluation Group |

Roles: Evaluator

Evaluating an institutional effort to train research staff to conduct culturally responsive and inclusive audience research. Collecting data from staff, analyzing it, and providing reports for continuous improvement purposes as well as tracking progress towards outcomes.

Site Visits and CLASS Observations for Level 4 and Level 5 School Monitoring

2015-2018

Concord Evaluation Group |

Roles: Evaluator

Certified in the CLASS observation method and conducted site visits to observe classrooms around the state of Massachusetts in Level 4 and Level 5 schools.

Professional experience

Concord Evaluation Group, Inc. <i>President and Principal Research Scientist</i>	2008-2024 2008-2024
American Institutes for Research <i>Principal Research Scientist</i> <i>Senior Research Scientist</i> <i>Research Scientist</i>	1997-2008 2004-2008 1999-2004 1997-1999
Walcoff & Associates, Inc. <i>Senior Research Analyst</i>	1994-1995 1994-1995
Institute for Social Analysis and ISA Associates, Inc. <i>Research Associate</i>	1990-1994 1990-1994

Education

Ph.D., Policy Research, Evaluation and Measurement, University of Pennsylvania	1999
M.A., Applied Social Psychology, The George Washington University	1992
B.A., Psychology, Clark University	1990

Publications and Presentations

(f/k/a Paulsen)

- Paulsen, C.A. (2019). Despite the odds: Young women who persist in engineering. Concord, MA: Concord Evaluation Group. Sponsored by DiscoverE Foundation.
- Paulsen, C.A. (2017). Evaluation of a global initiative to teach engineering and global competency to middle schoolers. Paper presented at 2017 Massachusetts STEM Summit, Worcester, MA.
- Paulsen, C.A. (2015). Digital resources for STEM learning and engagement: Young children to teens. Paper presented at 2015 Massachusetts STEM Summit, Worcester, MA.
- Paulsen, C.A., & Andrews, J.R. (2019). Using screen time to promote green time. *Afterschool Matters*, 30, 24-32.
- Paulsen, C.A. & Andrews, J.R. (2017). Evaluation of a multimedia STEM education program for Spanish-speaking families. Presented at the annual meeting of the American Evaluation Association: November 6-11, Washington, DC.
- Paulsen, C.A. & Andrews, J.R. (2014). The effectiveness of placing temporal constraints on a transmedia STEM learning experience for young children. *E-Learning and Digital media*, 11(2), 204-213.
- Paulsen, C. A., Carroll, E., Paulsen, O., & Andrews, J. R. (2021). Engaging children and families in active, environmental science learning through digital media. *International Journal of Early Childhood Environmental Education*, 8(2), 43-58.

Mandy Smoker Broaddus

Proposed Role: TA Provider and Content Expert
Leader - Native and Culturally Responsive Education
Equitable Learning and System Improvement

██████████ | smokerbroaddus@ednw.org



Dedicated and accomplished professional with a demonstrated history and national reputation in Indigenous education, school improvement, and systems change. Proven expertise in collaboration and capacity building across district, state, federal, and tribal levels.

Primary areas of expertise

- American Indian/Alaska Native education
- Culturally responsive technical assistance and evaluation
- Equitable school improvement
- Family/community/student/tribal engagement
- Strategic planning and needs assessment

Directly related project experience

Blackfeet Community College Community Needs Assessment & Strategic Planning 2021–2023

Blackfeet Community College | Evaluation team member and lead for strategic planning

Work alongside college leadership team to develop needs assessment and final report, which includes surveys, focus groups and other data collection from various community stakeholders. Use report to continue college dialogue in building strategic plan over six months.

Mat-Su Cultural Responsiveness Professional Development Series 2021–2022

Knik Tribe | Trainer/consultant

Provide varying levels of training to community members, various school staff and other audiences, in virtual and in person contexts. Training content consists of culturally responsive strategies, trauma informed practices and community/family engagement.

Native Education Collaborative 2019–present

U.S. Department of Education | Activity Team Lead

The Native Education Collaborative provides resources to connect state education agencies, Tribes and local school districts that foster stronger collaboration in support of Native students.

Tribal History/Shared History Curriculum 2018–present

Oregon Department of Education, Cow Creek/Siletz/Coquille Tribes | Project lead

Development of state-wide and tribally specific curriculum for four tribes in Oregon in support of Senate Bill 13 (Tribal History/Shared History). Teaching and learning material present accurate and authentic portrayals of Native history, culture, language, identity and contemporary contributions.

GEAR UP Montana Evaluation 2018–2022

Office of Commissioner of Higher Education | Evaluation Team member

Contribute to statewide evaluation of Gaining Early Awareness and Readiness for Undergraduate Programs (GEAR UP), a federally funded program designed to increase the number of low-income students who are prepared to enter and succeed in postsecondary education. Provides support for data collection, analysis and report writing.

Professional experience

Education Northwest, Portland, OR <i>Leader in Native and Culturally Responsive Education</i> <ul style="list-style-type: none">• Coordinate and provide direct services to personnel in state education agencies who are responsible for improving educational delivery and reporting systems.• Coordinate and lead technical assistance projects focused on capacity building, evidence-based inquiry, and practical application based on current issues, specifically in the areas of Indian Education, cultural responsiveness, strategic planning, equity and school improvement and community engagement.• Prepare and deliver presentations and workshops to district and SEA staff, stakeholders and other organizations both regional and nationally.	2018–present
Montana Office of Public Instruction <i>Director of Indian Education, School Transformation Director and Indian Student Achievement Specialist</i> <ul style="list-style-type: none">• Division administrator, overseeing the work of the Indian education division staff (7–25 specialists, both in agency and working remotely) efforts related to implementation of Indian Education for All and Indian student achievement initiatives. Duties included budget oversight, staff supervision, agency wide collaboration, technical assistance/professional development and other services in school districts and other organizations across the state.• Agency director overseeing federal School Improvement Grant initiative, targeting the lowest 5% performing schools across the state. Work included tribal, community and school consultation and engagement activities.• Duties focusing on the area of Indian student achievement, including research, analysis and dissemination of relevant student data, communication and collaboration with school districts and other organizations, development of educational resources and professional development, presentation at various conferences and other venues, site visitations, research of best practices and educational research and theory, and technical assistance	2005–2018
Frazer Public Schools <i>Dean of Students / Principal</i> <ul style="list-style-type: none">• Duties included supervision of K–12 staff, monitoring student attendance, discipline and academic achievement, designing professional development opportunities for staff, creating school calendars and student/teacher schedules, applying for and maintaining various state and federal grants, school and community committee work and teacher contract negotiations.	2002–2005
Fort Peck Community College <i>Instructor</i> <ul style="list-style-type: none">• Taught courses in Composition, American Indian literature, World Literature	2001–2005

Education

Honorary Doctorate of Humane Letters, University of Montana, 2023	
M.F.A., Fine Arts/Creative Writing, University of Montana	2002
English, University of Colorado Graduate School	
American Indian Studies, UCLA Graduate School	
B.A., Education/English, Pepperdine University	1997

Publications

- Smoker Broaddus, M., Halliday, D. (2019). *Becoming visible: A landscape analysis of state efforts to provide Native American education for all*. National Congress of American Indians.
- Smoker Broaddus, M. (2018, November 26). Creating a more welcoming and culturally responsive school community to engage American Indian and Alaska native families. [Blog series]. *Education Northwest blog*. <https://educationnorthwest.org/northwest-matters/creating-more-welcoming-and-culturally-responsive-school-community-engage-american>
- Juneau, D., Smoker Broaddus, M., Halliday, D. (2014). Big Sky Hope: How Montana's SEA supports turnaround in American Indian schools. In L. Morando Rhim & S. Redding (Eds.) *The State Role in School Turnaround* (pp 239–247). WestEd.
- Smoker Broaddus, M. (writer and cultural consultant). (2013). *Indian Relay*. Montana PBS.
- Kwasny, M., & Smoker, M. (Eds.) (2009). *I go to the ruined place: poems in defense of global human rights*. Lost Horse Press.
- Smoker Broaddus, M. & Juneau, D. (Eds.) (2006). And still the waters flow: The legacy of Indian Education in Montana [Special Section] *Phi Delta Kappan* 88(3) 193–197.
- Smoker, M. (2005). *Another attempt at rescue*. Hanging Loose Press

Presentations

- Smoker Broaddus, M., (2021). [Keynote presentation]. *Diverse and Inclusive Education – Understanding Culture and Relationships*. Montana Environmental Education Association.
- Smoker Broaddus, M., (2018). [Keynote presentation]. *Montana's Indian education for all and other successful programs*. South Dakota Indian Education Summit.
- Smoker Broaddus, M., (2018). [Presentation]. *Educational equity: Understanding our students and families*. Klamath County Public Schools Administrator's Training.
- Smoker Broaddus, M., (2018). [Presentation]. *Navigating and supporting cultural landscapes for equity in Education*. Montana Pre-School Development Conference
- Smoker Broaddus, M., (2018). [Presentation]. *ESSA consultation: Pre-planning template for tribal leaders*. Tribal Education Departments National Assembly.
- Smoker Broaddus, M., (2018). [Presentation]. *ESSA consultation: Pre-planning template for tribal leaders*. Flathead Reservation Area Schools, Title VI Parent Advisory Panels.
- Smoker Broaddus, M., (2017). [Presentation]. *Our blood remembers: Exploring and understanding contemporary American Indian literature for use in libraries and classrooms*. Pacific Northwest Library Association Annual Conference.
- Smoker Broaddus, M., (2017). [Webinar series]. *Government to government relationships and tribal consultation in Montana*. National Advisory Council on Indian Education.
- Smoker Broaddus, M., (2017). [Presentation]. *ESSA, schools of promise and Indian student achievement data*. Montana State Tribal Relations Interim Legislative Committee.
- Smoker Broaddus, M., (2017). [Keynote presentation]. *Navigating and supporting cultural landscapes for equity in education*. Innovations in Equity Conference, Wisconsin Department of Education.

Smoker Broaddus, M., (2016). [Presentation]. *ESSA and tribal consultation*. Montana Advisory Council on Indian Education Meeting / Tribal Consultation

Smoker Broaddus, M., (2016). [Keynote presentation]. *Indian education – Where do we go from here?* Confederated Salish & Kootenai Tribal Education Department Conference.

Smoker Broaddus, M., (2015). [Keynote presentation]. *Indian education for all: The Montana way*. Northern Arizona American Indian Teacher Education Conference.

Specialized training and expertise

- Culturally responsive and Indigenous evaluation models
- Trauma informed practices

Other professional activities

- Institute of Education Sciences/National Indian Education Study Technical Review Panel member, 2020–present
- Co-Montana Poet Laureate, 2019–2021
- National Advisory Council on Indian Education, President Obama appointee, 2016–present
- Humanities Montana Board Member, 2014–present
- Montana State University Bozeman, ILEAD Educational Leadership Advisory Board Member, 2012–18
- Superintendent Appointed Member of the College Board, 2008–2011
- Advisory Board Member, University of Montana Teacher Prep Program Project LETTERS, 2007–2011.

RunningHorse Livingston, M.Ed.

Role: Project Lead

Managing Consultant, Native & Culturally Responsive Education

|runninghorse.livingston@ednw.org



RunningHorse Livingston is a managing consultant specializing in culturally responsive education at Education Northwest. Dedicated to improving teaching practices, standards, and materials, RunningHorse has collaborated with tribes and rural communities across 30 states. He helps to create inclusive environments, particularly in mathematics, for students from diverse backgrounds and is a key figure in 21st-century education, providing comprehensive professional and curricular development nationwide. As part of the State Tribal Education Partnership initiative in Idaho, RunningHorse assisted the Nez Perce Nation in developing tribal teaching standards, adopted by the education department at nearby Lewis and Clark State College in 2021. RunningHorse also currently leads an effort to aid Michigan's Indigenous Education Initiative in developing decolonized teaching materials focused on the 12 tribal communities in the state. RunningHorse is a proud citizen of the Bad River Band of Lake Superior Chippewa and is based in Madison, Wisconsin.

Primary areas of expertise

- Mathematics Instruction & Coaching
- Culturally Responsive Pedagogy
- Equitable Learning Spaces

Directly related project experience

Region 17 Comprehensive Center

2023–present

U.S. Department of Education, Office of Elementary and Secondary Education |

Role: Equity Assurance in Mathematics Education

Supervise technical assistance projects, ensuring quality assurance in overall management, tools, products, and dissemination.

Culturally Responsive Learning and Systems Improvement

2023–present

Education Northwest

Role: Managing Consultant

Deliver direct services to state education agency staff to improve educational systems. Lead technical assistance projects focused on capacity building and practical solutions for challenges in Indian Education, cultural responsiveness, and equity. Present workshops and presentations regionally and nationally. Oversee technical assistance projects to ensure quality management, tools, and dissemination.

Leadership in Mathematics Education

2006–present

Mathematize, Inc.

Role: Director of Services

Design and develop professional learning frameworks to improve teaching practices, standards, and materials in collaboration with Tribes, state education departments, and school districts. Create learning systems and spaces that are inclusive environments in math and STEM education, for students from diverse backgrounds. Provide standards-based instructional coaching and assessment development in

schools nationwide. Design and instruct mathematics methods at the post-secondary level. RunningHorse is a proud citizen of the Bad River Band of Lake Superior Chippewa and is based in Madison, Wisconsin.

Professional experience

Education Northwest, Portland, OR

2023-present

Managing Consultant

- Develop collaboration opportunities to create greater justice, equity, inclusivity, and cultural responsiveness in schools and classrooms.

Mathematize, Inc. Madison, WI

2002-2023

Director

- Provide professional learning opportunities in mathematics education for students and teachers in PreK-PostK classrooms.

Ho-Chunk Nation Education, Madison, WI

2002-2004

Youth Center Director

- Create and coordinate after school enrichment for tribal students in the Madison Metropolitan School District.

Education

Master of Education, University of Minnesota – Duluth

2005

Bachelor of Arts, University of Minnesota – Twin Cities

2001

Presentations

Livingston, RunningHorse. (2023). Teaching math outdoors for elementary educators. [Lead Presenter]. Field Edventures Seminar, virtual.

Livingston, RunningHorse. (2021). Rehumanizing 21st century math classrooms. [Lead Presenter]. Montana GEAR UP meeting, virtual.

Livingston, RunningHorse. (2019). Teaching culturally and inclusively. [Keynote]. Wisconsin Technical College System meeting, Madison, WI.

Livingston, RunningHorse & Erb, Bobbi Jo. (2018). What it means to teach culturally. [Workshop leader]. National Council of Supervisors of Mathematics, Washington, DC.

Livingston, RunningHorse. (2016). A self determined pedagogy. [Keynote address]. Wisconsin Indian Education Association, Bayfield, WI

Other professional activities

- American Indian Science & Engineering Society
- Wisconsin Mathematics Council
- National Indian Education Association

Cortney Rowland, Ph.D.

Proposed Role: TA Provider and Content Expert

Senior Leader, Large Scale Technical Assistance &

Educator Effectiveness, Equitable Learning & Systems Improvement

██████████ | cortneyrowland@ednw.org



- Accomplished and respected *researcher*, program evaluator, policy analyst, and technical assistance *provider* with more than twenty years' experience supporting schools, districts, communities, states, and the U.S. Department of Education to continuously improve education systems
- *Expertise* in systems change and improvement; connecting research, policy, and practice; networked improvement communities; and teacher and school leader effectiveness and educator workforce systems, with particular emphasis on teacher pay, teacher recruitment and retention, principal professional development, teacher pipelines, and teacher residencies.
- Strategic, organized, and adaptable *director* with a practiced background in setting and executing a vision and plan; leading teams; and collaboratively designing and managing timely, efficient, mission-driven, outcomes-based, and on-budget programs, projects, and deliverables.
- Ph.D. in Sociology from Loyola University, Chicago.

Primary areas of expertise

- Educator Recruitment, Retention, and Support
- Systems Change and Improvement
- Connecting Policy, Research, and Practice

Directly related project experience

Florida Network for School Improvement (FNSI)

2019-2021

Bill and Melinda Gates Foundation (BMGF) | Co-Director

Co-led a 12-person team of researchers, analysts, and technical assistance providers operating as an intermediary for the Florida Network for School Improvement (FNSI). FNSI is an \$8.9 million [project funded by the Bill & Melinda Gates Foundation](#). As the intermediary, AIR partners with the School District of Osceola County (SDOC) to support and build the capacity of school teams to employ disciplined continuous improvement work that includes: identifying a problem of practice, conducting a root cause analysis, testing out evidence-based practices, and determining what works in specific contexts to improve college-ready on track indicators for Black, Latino/a, and low-income high school students, and then sharing and scaling those practices across the network. As co-lead of the project, responsibilities focused on all aspects of project design, management, and implementation, including setting and communicating about project direction, timeline, and outcomes; arranging and supporting project staffing; managing project budget; leading partner relationships and communication with the project funder, stakeholders, and client; sharing about the work in the field; and ensuring high quality standards for all project activities and deliverables.

Center on Great Teachers and Leaders (GTL Center)

2018-2021

U.S. Department of Education | Deputy Director and Senior Advisor

Served as the co-deputy director of the federally funded national content [Center on Great Teachers and Leaders](#). In that role, contributed to strategic planning and managed a portfolio of intensive technical assistance projects designed to support states and districts in attracting, developing, and retaining excellent teachers and leaders in the highest need, lowest performing schools across the country. Managed the Center's \$16 million budget, collaborated with the leadership team to set the strategic vision for the Center, and coordinated communications and reporting to the U.S. Department of Education. The federally-supported component of the Center sunsetted on September 30, 2019. Subsequently served as a senior advisor to the GTL Center now operated by AIR.

Equitable Access of Effective Educators

2015-2018

Center on Great Teachers and Leaders | Senior Advisor

Advised a cross-organization team of staff to design and implement technical assistance and tools and resources for states and school districts focused on strategies to expand equitable access to effective educators.

Collaborative for the Continuous Improvement of Educator Effectiveness Systems

2015-2018

Center on Great Teachers and Leaders | Project Lead

Led the GTL Center's Collaborative initiative—a community of practice comprised of teams from six states focused on improving their educator evaluation and support systems. Managed a cross-organization team to plan convenings, direct the focus of the work, and provide group and individualized technical assistance. Led the development of the Collaborative's final white paper and self-assessment tool, [Improving Instruction for All Students Through Meaningful Support in Educator Evaluation](#).

Beyond Accountability

2015-2018

Bill & Melinda Gates Foundation (BMGF) | Project Director

Directed a \$1.3 million Gates Foundation-funded initiative designed to help school districts improve the use of information from evaluation and professional growth systems to support teaching and learning. Participating districts used continuous improvement cycles to address problems of practice and engaged in cross-district networking to support advancements in project work and share lessons learned.

Talent Development Framework

2015-2018

Michigan Department of Education (MDE) | Project Lead

Lead technical assistance consultant supporting MDE around creating and managing an aligned and coherent talent development system using the GTL Center's [Talent Development Framework](#). Convened a team of MDE staff on a regular basis to inventory, prioritize, and implement talent development policies, programs, and strategies as well as align internal agency staff and offices around talent development plans and strategic thinking.

School Leadership Standards Crosswalk and Toolkit

2015-2018

Center on Great Teachers and Leaders (GTL Center) | Project Lead

PSEL Advisory Group | Member

Managed the development of a [school leadership standards crosswalk](#) [between the ISLLC 2008 school leader standards and [Professional Standards for Educational Leaders \(PSEL\)](#)] and toolkit designed to help states align their current school leadership standards with the PSEL 2015. Member of a nationally representative advisory group developing and finalizing the PSEL.

Professional experience

Education Northwest

2024-Present

Senior Leader, Large Scale Technical Assistance & Educator Effectiveness

National Center for Teacher Residencies (NCTR)	2021-2024
<i>Director of State & Federal Policy</i>	
American Institutes for Research (AIR)	2015-2021
<i>Principal Technical Assistance Consultant</i>	2018-2021
<i>Senior Technical Assistance Consultant</i>	2015-2018
National Governors Association (NGA) Center for Best Practices	2012-2015
<i>Senior Policy Analyst</i>	
Independent Consultant	2011-2012
Learning Point Associates/AIR	2008-2011
<i>Senior Policy Associate Role 2</i>	20xx-20xx

Education

Ph.D. Loyola University Chicago, Sociology	2014
M.A. Bowling Green State University, Sociology	2001
B.A. Ohio University, Sociology & French	1999

Publications

- Rowland, C., Grossman, T. & Levay, K. (2024, January). NCTR evaluation of the Connecticut Teacher Residency Program. National Center for Teacher Residencies.
<https://nctresidencies.org/resource/evaluation-of-the-connecticut-teacher-residency-program/>
- Rowland, C., Azar, T., Grossman, T., Mottes, G. (2024, January). State Policies to Support Teacher Residences: An Overview. National Center for Teacher Residencies.
<https://nctresidencies.org/resource/state-policies-to-support-teacher-residences-an-overview/>
- Rowland, C., Martin Goggins, K., Williams Eubanks, A., & Simpson Zulfiqar, A. (February 2023). Doing Better for Black Educators: Six Policy Recommendations for Improving the Recruitment and Preparation of Black Educators. National Center for Teacher Residencies (NCTR).
<https://nctresidencies.org/wp-content/uploads/2023/02/Doing-Better-for-Black-Educators-February-2023.pdf>
- Scheib, C. and Rowland, C. (July 2022). External Evaluation of the Albuquerque Teacher Residency Partnership (ATRP). National Center for Teacher Residencies.
<https://nctresidencies.org/resource/external-evaluation-of-the-albuquerque-teacher-residency-partnership-atrp/>
- Rowland, C., Feygin, A., Lee, F., Gomez, S., & Rasmussen, C. (October 2018). Improving the Use of Information to Support Teaching and Learning Through Continuous Improvement Cycles. American Institutes for Research (AIR). <https://files.eric.ed.gov/fulltext/ED592098.pdf>
- Rowland, C. (2017). Principal Professional Development: New Opportunities for a Renewed State Focus. Education Policy Center at American Institutes for Research (AIR).
<http://www.air.org/sites/default/files/downloads/report/Principal-Professional-Development-New-Opportunities-State-Focus-February-2017.pdf>
- Carlson, D. & Rowland, C. (2017). How Maryland Policymakers Are Working Together to Improve School Principal Quality. Washington, D.C.: National Governors Association. <https://www.nga.org/wp-content/uploads/2019/10/9.1-How-Maryland-Policymakers-Are-Working-Together-to-Improve-School-Principal-Quality.pdf>

- Rowland, C. (2015). Improving Educational Outcomes: How State Policy Can Support School Principals to Lead Change. National Governors Association.
- Potemski, A., Rowland, C., & Witham, P. (2011). Performance Based Compensation Structures: Considerations for Individual, Group, and Hybrid Programs. Center for Educator Compensation Reform. <https://www.ride.ri.gov/Portals/0/Uploads/Documents/Teachers-and-Administrators-Excellent-Educators/Performance-Based-Compensation/CECR-Performance-Based-Compensation-Structures.pdf>
- Laine, S., Potemski, A., & Rowland, C. (2010). Compensation reform in the schools: The burgeoning interest in using teacher pay as a strategic tool for competitive recruitment and retention of effective teachers. *The School Administrator*, March 2010, Number 3, Vol. 67.
- Goe, L. (Ed.) (with C. Rowland, as contributing author) (2009). America's opportunity: Teacher effectiveness and equity in K–12 classrooms. Washington, DC: National Comprehensive Center for Teacher Quality. <http://www.gtlcenter.org/sites/default/files/docs/2009BiennialReport.pdf>
- Rowland, C., & Potemski, A. (2009). Alternative compensation terminology: Considerations for education stakeholders, policymakers, and the media. *Emerging Issues*. Center for Educator Compensation Reform (CECR). <https://eric.ed.gov/?id=ED533047>

Presentations

- Rowland, C., Campbell, K.H., & Sanders, M. (January 2024). The Role of Registered Apprenticeships in Supporting Teacher Residency Program Financial Sustainability. Presentation at the NASDTEC and NCGYO National Convening on Registered Apprenticeships in Teaching.
- Williams Eubanks, A., Rowland, C., Goggins, K., Duncan, E., Campbell, K.H., King, C., Hamilton, L., Wilkerson, F., & Daniels, L. (2023, February). Doing Better for Black Educators: Six Policy Recommendations for Improving the Recruitment and Preparation of Black Educators. National Center for Teacher Residencies (NCTR) National Webinar. https://www.youtube.com/watch?v=L6ly_h2q-Mg
- Rowland, C., and McNair, S. (2023, January). Teacher Residencies and Registered Teacher Apprenticeships. Presentation at the Washington State Teacher Residency Symposium.
- Rowland, C. (2022, October). Teacher Residencies: A Pathway that Prepares Effective and Diverse Teachers Who Stay. Presentation at the NCSL Education Leaders Retreat.
- Feygin, A., Rowland, C., & Burgess, K. (2019, January). Building Evidence for School Improvement: Leveraging Networked Improvement Communities. Presentation at the National ESEA Conference.
- Rowland, C., Feygin, A., Burgess, K., & Clayton, R. (2018, December). The Potential for Improvement Science in Schools and Districts in the Age of the Every Student Succeeds Act. Webinar Presentation to the American Association of School Administrators (AASA). [https://www.aasa.org/uploadedFiles/Programs_and_Events/PotentialforImprovementESSA\(1\).PDF](https://www.aasa.org/uploadedFiles/Programs_and_Events/PotentialforImprovementESSA(1).PDF)
- Rowland, C. (2017, July). Building the Educator Workforce Our Children Need Now: Developing and Supporting Educators. Presentation to the Center for Education Equity's Community of Practice.
- Rowland, C. (2017, June). Principal Professional Development: New Opportunities for a Renewed State Focus. Presentation to the Tennessee Transformational Leadership Alliance Design Team.

- Rowland, C. (2017, May). Principal Professional Development: New Opportunities for a Renewed State Focus. Presentation to CCSSO's National and State Collaboration for Educator Effectiveness (NSCEE) Network.
- Rowland, C. & Berg-Jacobson, A. (2017, January). Teacher Effectiveness Under the Every Student Succeeds Act. Presentation to CCSSO's National and State Collaboration for Educator Effectiveness (NSCEE) Network.
- Rowland, C. (2016, August). ESSA Implementation: Developing Effective School Principals. National Association of Elementary School Principals (NAESP) Webinar.
- Rowland, C. (2016, February). Access and Equity: Strengthening Leadership Capacity. Presentation at the West Comprehensive Center Meeting Regional Meeting. Phoenix, AZ.
- Rowland, C & Silverman, S. (2015, February). Strengthening the Principal Pipeline: Leveraging Policy to Support Principal Quality. Presentation at the Topical Meeting on Equitable Access to Excellent Teachers and Leaders hosted by the Council of Chief State School Officers (CCSSO) and the Center on Great Teachers and Leaders.
- Rowland, C., Taliaferro, L., & Young, M. (2013, April). Leadership for Leveraging Learning and Teaching. Panel at the Council of Chief State School Officer's (CCSSO) State Consortium on Educator Effectiveness (SCEE) Meeting.
- Rowland, C. (2013, March). Educator Evaluation Reform: The National Context. Presentation to a Joint Meeting of the Nevada Assembly Committee on Education and the Nevada Senate Committee on Education. Carson City, NV.
- Rowland, C. (2008, August). Utah's Differentiated Compensation Work Group: Outreach plan. Presentation given at the Utah State Board of Education Differentiated Compensation Work Group meeting, Salt Lake City, UT.
- Coulter, T., & Rowland, C. (2008, March). Policy levers and gaps in addressing availability, recruitment, and retention of highly qualified teachers for urban, at-risk schools. Paper presented at the American Educational Research Association Conference, New York.

Silvana Esposito Hackett

Proposed Role: TA Provider and Content Expert

Senior Research Analyst, Child Trends

 | shackett@childtrends.org

Silvana Esposito Hackett is a Senior Research Analyst in the Early Childhood Systems Building research area at Child Trends. Her research focuses on policies that support the youngest and most vulnerable populations in achieving equitable education, health, and social outcomes, and she has extensive expertise in state-level early childhood administrative data. At Child Trends, Ms. Hackett works on a variety of projects focused on research and technical assistance to support states and organizations with early childhood data use. Ms. Hackett previously served as an epidemiologist for Montana’s Maternal, Infant and Early Childhood Home Visiting (MIECHV) program and is experienced with linking and using early childhood administrative data to answer key policy questions. She also supported the Montana Office of Public Instruction in their implementation of a federal Preschool Development Grant (PDG) and worked with local and state Head Start leaders to integrate Head Start enrollment data into the state student information system. She developed data systems to link information on developmental assessments, early childhood learning environments, and early childhood workforce to support PDG work. In this role, she also provided data and federal reporting support for federal Title I and Title VII programs serving low-income, migrant, neglected and delinquent, homeless and English learner students. Ms. Hackett also has experience with designing and implementing program evaluations and needs assessments.

Primary areas of expertise

- Early learning
- School improvement
- Student information systems
- Stakeholder engagement
- Implementation science

Directly related project experience

California Whole Child Framework Development

2024–Present

Agency/firm | Child Trends

Roles: Senior Research Analyst

The State of California passed legislation that calls for the development of a Whole Child Equity Framework and Whole Child Community Equity Screening Tool to provide the data needed to support the equitable distribution of resources and monitor progress on addressing racial and economic inequities. Ms. Hackett supports the facilitation of a Whole Child Equity Framework workgroup of stakeholders in selecting framework indicators and metrics by synthesizing research, incorporating workgroup discussions into Framework and Equity Tool development, and preparing final recommendations for to the Department of Social Services.

California Regional Market Rate Evaluation Plan

2024

Agency/firm | Child Trends

Roles: Senior Research Analyst

Child Trends is collaborating with the California Department of Social Services (CDSS) and affected community members to design an evaluation framework to assess the impact of the revised market rate methodology used by the state to set child care subsidy rates. For this project, Ms. Hackett is responsible for data mapping, analysis of qualitative data, evaluation plan development and preparing a final evaluation plan report to CDSS.

MIECHV Legislative Changes Implementation

2022–Present

Agency/firm | Child Trends

Roles: Senior Research Analyst

Child Trends is subcontracted to provide subject matter expertise to technical assistance providers supporting MIECHV programs who received grants to work on innovative data interoperability practices in home visiting. Ms. Hackett's role as a Project Manager includes task and budget management as well as substantive contributions, such as content expertise to the primary contractor to support states in the implementation of innovative data practices, including development of technical assistance resource products.

Early Childhood Data Collaborative

2022–2024

Agency/firm | Child Trends

Roles: Senior Research Analyst

The Early Childhood Data Collaborative supports policymakers in the development and use of statewide early childhood data systems. Ms. Hackett's role involves survey design and data analysis for national scans of early childhood data integration efforts as well as collecting feedback from state early childhood leaders on current needs and interests related to early childhood data systems. Ms. Hackett also provides targeted technical assistance as needed to state affiliates of the Alliance of Early Success on data collection and other early childhood data topics.

Pre-K Data Equity Framework

2022–2024

Agency/firm | Child Trends

Roles: Senior Research Analyst

Child Trends developed a Pre-K Data Equity Framework that provides guidance to leaders of publicly funded pre-K on research questions and data needed to inform policy efforts and programmatic decisions to strengthen and expand pre-K in an equitable and inclusive way. Ms. Hackett supported a consortium of experts in the development of research questions and metrics at the core of this Framework and developed an implementation guide to support preschool leaders engage with the Framework.

INQUIRE Data Toolkit Update

2022–2024

Agency/firm | Child Trends

Roles: Activity Lead

The INQUIRE Data Toolkit provides tools to support effective data collection to answer important policy and reporting questions using common data elements to evaluate Quality Rating and Improvement Systems (QRIS) and other quality initiatives. Ms. Hackett serves as the activity lead to update policy topics, reporting requirements, and data elements; to develop new research questions; and to revise the web version of the toolkit.

Hackett 2

Professional experience

Child Trends	2022–Present
<i>Senior Research Analyst</i>	
Montana Department of Health and Human Services	2019–2022
<i>Healthy Montana Families Epidemiologist</i>	
Montana Office of Public Instruction	2017–2019
<i>PDG and Federal Programs Operations Research Analyst</i>	
United Way of Yellowstone County	2015–2017
<i>Community Impact Analyst</i>	
United Way of Olmsted County	2013–2015
<i>Community Impact/Campaign Analyst</i>	
University of Minnesota	2011–2013
<i>Immigration Policy Research Assistant</i>	
<i>Research Assistant, Center for Urban and Regional Affairs</i>	
Eden I&R	2007–2010
<i>Community Programs Manager</i>	

Education

M.P.P., University of Minnesota	2012
B.A., Political Science, University of California	2007

Publications and Presentations

Richards, D., Hackett, S.E., Jordan, E., Lin, V., & King, C. (2024). *System Transformation for Equitable Preschools (STEP forward with data) framework implementation guide*. Child Trends. DOI: 10.56417/936c2388h

Lin, V., Hackett, S.E., Richards, D., King, C., & Bredeson, M. (2023). *System Transformation for Equitable Preschools (STEP forward with data) framework: Moving toward an equitable preschool system*. Child Trends. DOI: 10.56417/7986y3601e

Hackett, S.E., & King, C. (2023). *States' Preschool Development Grant applications reveal priorities for stronger data integration*. Child Trends. DOI: 10.56417/4224m6501x

Fennelly, K., Pearson, K., Hackett, S. (2015). The US Congressional immigration agenda: Partisan politics, policy stalemate and political posturing. *Journal of Ethnic and Migration Studies*. 41:9, 1412-1432, DOI: 10.1080/1369183X.2015.1021586

Hackett, S. (2012). *Rental licensing to achieve compliance*. Center for Urban and Regional Affairs, University of Minnesota.

Hackett, S. (2011). *Intergenerational Community as Intervention*. Center for Urban and Regional Affairs, University of Minnesota.

Ben Cronkright

Proposed Role: Technical Assistance Provider and Content Expert

Senior Advisor, Child Trends

 | bcronkright@childtrends.org

Ben Cronkright, MA, has worked directly with stakeholders at all levels of the education system for nearly a decade, including board of education members, state education agency staff, state and district superintendents, and school faculty. He has expertise on various topics, including strengthening teacher pipelines, family and community engagement, school and district leadership, and systems improvement. In his technical assistance, Cronkright provides easy-to-understand research-based insights to develop more equitable and just education systems that better meet school community needs. He led K-12 research-practice partnerships to address complex, high-priority challenges in schools within the Regional Education Laboratory in Hawai'i, Palau, and the Federated States of Micronesia—and in the Central Plains states—through the U.S. Department of Education Comprehensive Center Program. Cronkright also served as the federal programs manager/academic officer for the Hawaii State Charter School Commission, as an elementary school principal, and as a high school vice principal in Michigan.

Primary areas of expertise

- Educator workforce development
- Improvement Science
- Change management
- Strategic planning
- Student engagement

Directly related project experience

Innovation to Evidence Network Experience

2023–Present

Agency/firm | Child Trends

Roles: Senior Advisor

Cronkright is advising a three-year technical assistance network that provides services to seven local education agencies and their implementation and research partners (i.e., innovation teams) who are designing, implementing, and evaluating an innovative intervention to advance student success. He leads planning to support (a) needs sensing to capture innovation teams' progress and understand their needs, (b) facilitate a networked improvement community to enable innovation teams to connect and learn from one another, and (c) provide coaching and training to address the unique needs of innovation teams. Findings from this project demonstrate the efficacy of a collaborative network model, utilizing improvement and implementation science practices, in supporting innovation teams to design, implement, and evaluate innovative interventions aimed at enhancing student success. Dissemination products thus far include four published practice guides.

North Dakota Support for Low-Performing Schools

2023–Present

Agency/firm | Child Trends

Roles: Project Lead

Cronkright serves as the project lead for a technical assistance project aimed at enhancing the capabilities of State Education Agency (SEA) leadership in North Dakota to effectively support and uplift chronically underperforming schools. This is a three-phase project designed to assist ND SEA leaders in

the development, design, and delivery of a comprehensive statewide intervention. The primary objective is to facilitate marked improvements in student outcomes by implementing targeted strategies tailored to the specific challenges faced by North Dakota's most underperforming public schools. The first phase focuses on in-depth analysis and planning, ensuring that the intervention strategies are based on robust data and tailored to local needs. The second phase involves the development and refinement of intervention frameworks, guided by evidence-based practices and collaborative stakeholder engagement. In the final phase, provide support to the SEA in the implementation and monitoring of these strategies, providing ongoing feedback and adjustments to maximize their effectiveness.

The Hui for All to Benefit from Hawaiian Education

2021–2023

Agency/firm | McREL International

Roles: Partnership Lead

Cronkright led statewide strategic planning processes through a research-practice partnership (RPP). Through cross-sector partnership structure and activities, he led systemic change efforts to promote equity and the need to support each student to meet their full potential. The partnerships action seeks to promote, place-based, and project-based pedagogy by grounding instruction and assessment in shared ways of being, knowing, and doing to respond to the needs of each and every learner in Hawai'i schools.

Accomplishing Effective and Durable Change to Reduce Student Achievement Gaps in North Dakota Targeted Support and Improvement Schools

2019–Present

Agency/firm | McREL International

Roles: Project Lead

Cronkright manages research projects and program development for state, school, and district-level systems improvement and leadership development, resulting in changes in state policy for K–12 schools. He conducts vision and mission planning to support the North Dakota Department of Public Instruction's teams and local school districts in the use of improvement science methods and tools to guide and inform equitable outcomes for traditionally marginalized students and communities in North Dakota.

Palau Partnership for the Improvement of Teaching

2018–2023

Agency/firm | McREL International

Roles: Project Lead

Cronkright led regional strategic planning processes through root cause and analysis to support improved effectiveness and student learning outcomes throughout K–12 and higher education institutions. He coached chief executives through gap analysis and assessments and accelerated systemic improvement through Networked Improvement Communities. Cronkright solidified stakeholder capacities using continuous improvement processes to collect and sharpen data to support systemwide, high quality professional learning for teachers, coaches, and school leaders in the implementation of evidence-based instructional programs and practices and used disciplined inquiries to drive improvement including the PDSA process. Finally, he prepared reports, plans, and presentations for US Department of Education's Institute of Education Sciences.

Mapping and Spreading the Reading Now Network (RNN) Improvement Process

2018–2020

Agency/firm | McREL International

Roles: Project Lead

Cronkright generated a productive collaboration from school, district, and regional education center leaders to identify and remove barriers related to early literacy achievement for all students and scaling the use of best practices/ programs through NICs. He guided mission and vision planning by serving the partnership of business, education, labor, philanthropy, civic, and parent leaders in designing a statewide education innovation center to increase education outcomes in Michigan. Cronkright led a

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team of 55–60 teachers, principals, and superintendents in the design and implementation of a developmental evaluation study to learn quickly about the spread and use of essential literacy practices in K–8 classrooms.

North Dakota Statewide Content Standards Development

2017–2019

Agency/firm | McREL International

Roles: Project Lead

Cronkright facilitated the design and redesign of statewide content standards through increased engagement and shared understanding in North Dakota, engaging in cross-sector working groups that include representatives from K–12 higher education, nonprofit, business, and health organizations; generated stakeholder engagement through community members within the industry, tribal councils, and nonprofit organizations. He led the development of professional learning in support of the implementation of statewide standards.

Building Capacity to Engage in Culturally Responsive Evaluation and Research in RMI

2016

Agency/firm | McREL International

Roles: Project Lead

Cronkright brought together education stakeholders throughout RMI, including the RMI Public School System, College of the Marshall Islands, private school representatives, and school principals, to strengthen local capacity to conduct in-depth research and evaluation. He provided support to increase stakeholders' understanding of the use of data, research, and evaluation in examining and affecting the implementation, assessment, and ongoing improvement of a variety of educational initiatives, including the development and implementation of a teacher evaluation system.

Identifying and Implementing Promising Practices in Family and Community Engagement in Guam **2016**

Agency/firm | McREL International

Roles: Project Lead

Cronkright brought together education stakeholders throughout Guam, including members from the Guam Department of Education, Guam Community College, University of Guam, and other government and community stakeholders, to strengthen local capacity to better align district activities to support family engagement in school, with the goal of supporting a more cohesive, consistent, and standardized set of approaches to family and community engagement in Guam.

Using Data to Improve Education Management Information Systems in Kosrae and Pohnpei

2016

Agency/firm | McREL International

Roles: Project Co-Lead

Cronkright brought together education stakeholders throughout Pohnpei and Kosrae within the Federated States of Micronesia (FSM; including the FSM National Department of Education, Kosrae and Pohnpei Public School Systems, private school representatives, and school principals) to strengthen local capacity in understanding the use of data in improving student outcomes.

Evaluation of the Hawaii Innovative Learners Network (HILN)

2016

Agency/firm | McREL International

Roles: Project Lead

Cronkright conducted a comprehensive, mixed-methods evaluation of the HILN program to understand the program's impact on important school, classroom, and student outcomes. He provided all stakeholders with useful and timely information to help guide the strategies and continuous improvement efforts of the HILN initiative throughout Hawai'i schools.

Professional experience

Child Trends <i>Senior Technical Assistance Specialist</i>	2023-Present 2023-Present
Global Exchange Academies at Mid Pacific Institute <i>Senior Consultant</i>	2023 2023
McREL International <i>Senior Manager</i> <i>Managing Consultant</i>	2016-2023 2022-2023 2016-2022
Hawaii Department of Education/Hawaii State Charter School Commission <i>Federal Programs Manager/Academic Officer</i>	2014-2015 2014-2015
Midland Public Schools <i>Principal</i> <i>Assistant Principal</i> <i>Teacher</i>	2004-2014 2011-2014 2009-2011 2004-2009
Williamson County Schools <i>Teacher</i>	2003-2004 2003-2004

Education

M.A., Educational Leadership, Saginaw Valley State University	2008
B.A., Secondary Education (History, English), Saginaw Valley State University	2003

Publications and Presentations

- Aceves, L., Ball, J., Cronkright, B., & Holquist, S.E. (2024). How to use practical measures to transform school systems. *Child Trends*. DOI: 10.56417/3083y3092
- Cronkright, B., C. Keehne (2023, April) *‘Āina-based and Place-based Education in Hawai‘i schools: Charting an NIC’s Journey to Equitable Practice* [Conference presentation]. Carnegie Summit on Improvement in Education, San Diego, CA.
- Cronkright, B., K. Ahuna (2022, December) *Measuring What Matters: Analytics to Support Networked Improvement Communities and Place-Based Education* [Webinar presentation]. REL Pacific.
- Cronkright, B., C. Sandoval (2022, October) *Power and Positioning in Researcher-Practitioner Partnerships: Developing a Theory of Practice Improvement* [Webinar]. REL Pacific.
- Cronkright, B. (2022, October) *Hui for All to Benefit from Hawaiian Education* [Conference presentation]. Schools of the Future Conference, Honolulu, HI.
- Cronkright, B. (2021, March). *Teacher professional learning policies in Palau* [Online conference presentation]. Association for Education Finance and Policy Annual Conference.
- Cronkright, B., & Peterson, A. (2021, February). *U.S. Department of Education: School improvement in a challenging context* [Online conference presentation]. National Elementary and Secondary Education Act (ESEA) Conference.

Cronkright, B. (2019, October). *The Reading Now Network: A collective mission to provide students a clear pathway to early literacy success* [Conference presentation]. Michigan Association of Superintendents Fall Summit, Traverse City, MI.

Cronkright, B., Haines, P., Cooperman N., & Guaseferro, L. (2018, April). *Variation in performance is the problem to be solved: The use of data in improving literacy outcomes* [Conference presentation]. Carnegie Foundation Education Summit on Improvement in Education, San Francisco, CA.

Tameka Porter

Proposed Role: TA Provider and Content Expert

Senior Research Fellow, Child Trends

tporter@childtrends.org

Tameka Porter, PhD, is an expert in applying improvement science and implementation science to support state education agencies in enhancing their educational systems, with a particular focus on improving outcomes for multilingual learners. She has a proven track record of leading technical assistance projects that utilize data to inform program design and implementation. Porter leverages improvement science cycles to measure effectiveness and refine interventions, ensuring continuous progress. For example, in collaboration with the Hawai'i Department of Education and the University of Hawai'i-Manoa, Porter developed data-driven strategies aligned with local practices focused on improvement academic achievement for multilingual learners. This work led to measurable gains in both academic performance and postsecondary access for multilingual students. Porter fosters collaboration between state agencies, universities, and educators to implement evidence-based practices and improve educational opportunities for all students.

Primary areas of expertise

- Multilingual learners
- Educator workforce development
- School improvement
- Improvement science
- Research-practice partnerships
- Culturally responsive education practices and pedagogies

Directly related project experience

Project Postsecondary Opportunities in Special Education (POSE)

2023–Present

Agency/firm | Maryland State Department of Education; Townson University

Roles: Evaluator

Porter conducts artifact reviews, provides feedback on project activities, serves as member of advisory board, and measures program results along the four specific project objectives. Project POSE is funded through the U.S. Department of Education's Office of Special Education Programs (OSEP) to recruit and retain diverse 20 students and educators with an Associate's degree to continue and complete their special education training at Coppin State University. In year one of the project, Project POSE successfully developed scholar selection criteria and has recruited 26 applicants for potential admission into the program.

Scholarships in Science, Technology, Engineering, and Mathematics (S-STEM)

2022–2023

Agency/firm | American Institutes for Research

Roles: Project Director

Porter worked with PI to provide administrative and budget development and management support, led team of six that developed faculty and student surveys to examine the efficacy of S-STEM program activities on persistence and retention in STEM majors at HBCUs. The S-STEM Program supports institutions of higher education to fund scholarships for academically talented low-income

undergraduate and graduate students and to study and implement a program of activities that support their recruitment, retention and graduation in STEM.

COVID-19 and Equity in Education

2022–2023

Agency/firm | American Institutes for Research

Roles: Project Director

Porter directed a team of four to examine postsecondary interest rates and needed supports for college success for students in grades 7-12 before, during, and after COVID-19. Half (50%) of the student population responded to the survey (N=325); students across all racial groups reported high postsecondary interest (80-90%) and noted study skills (71%) as the most needed support to be successful in college.

Region 11 Comprehensive Center, Nebraska Department of Education

2019–2022

Agency/firm | McREL International

Roles: State Lead

Porter developed project work plans, timelines, and staffing resources with partners, subcontractors, and consultants, evaluated implementation efficacy and effectiveness. Partnered with the Nebraska Department of Education (NDE) to develop an equity framework for continuous school improvement for 274 Additional Targeted Support and Improvement (ATSI) schools to ensure data equity and serve as a baseline for assessing data quality in Nebraska's schools, districts, and colleges.

Region 12 Comprehensive Center, Kansas State Department of Education

2019–2022

Agency/firm | McREL International

Roles: State Lead

Porter developed logic models, project timelines, and evaluated program effectiveness. Partnered with Kansas State University, the Kansas Association of School Boards, and the United School Administrators of Kansas to implement school redesign that incorporates personalized and project-based learning experiences. Conducted surveys to evaluate the efficacy of state, university, and school policies on school climate, postsecondary access, and academic and social-emotional outcomes.

Regional Educational Laboratory Pacific, Institute of Education Sciences

2019–2022

Agency/firm | McREL International

Roles: Research Partnership Lead

Porter led research and evaluation activities to support academic achievement for multilingual learners in Hawai'i. Directed programs with the University of Hawai'i- Manoa and the Hawai'i Department of Education on data use and monitoring strategies to support improving academic achievement and postsecondary outcomes that align with local culturally responsive practices.

Using Data to Improve Outcomes for Hawai'i's Asian American and Pacific Island (AAPI) English Learners, Hawai'i Department of Education

2015–2019

Agency/firm | WIDA at the University of Wisconsin-Madison

Roles: Evaluator

Porter led a team of three to evaluate assessment data tools to improve academic achievement outcomes for AAPI students. Provided training and coaching for 400 teachers and leaders on evidence-based curriculum and instruction strategies for exiting and reclassifying AAPI multilingual learners from English language programs.

Professional experience

Child Trends <i>Senior Research Fellow</i>	2024–Present
Towson University <i>Special Assistant to the President</i>	2024–Present
Maryland State Department of Education <i>Executive Director</i>	2023–2024
American Institutes for Research <i>Senior Researcher</i>	2022–2023
McREL International <i>Managing Consultant</i>	2019–2022
WIDA at the University of Wisconsin-Madison <i>Researcher</i>	2015–2019
Beta Group Consulting <i>Consultant</i>	2012–2019

Education

Ph.D., Public Policy, George Mason University	2015
M.A., Teaching English to Speakers of Other Languages, American University	2009
B.S., Business Administration, University of South Carolina	2007

Publications and Presentations

- Porter, T. (2023, November 13–15). *Making assessment matter: Exploring three key ideas that guide assessment literacy* [Keynote address]. Maryland Assessment Group, Ocean City, MD, United States.
- Ariovich, L., & Porter, T. (2023, November 13–15). *Navigating the Maryland report card* [Conference presentation]. Maryland Assessment Group, Ocean City, MD, United States.
- Holquist, S., & Porter, T. (2022, April 21–26). *Nite and day: Students' divergent experiences with culturally response communication and decision-making at historically Black colleges and universities and predominately white institutions during the COVID-19 pandemic* [Conference presentation]. American Educational Research Association, San Diego, CA, United States.
- Spinelli, H., Porter, T., & Tedrow, M. (2022, January 29). *Alternative ways to evaluate the success of students, teachers, and schools* [Audio podcast]. <https://larryferlazzo.edublogs.org/2022/01/29/my-latest-bam-radio-show-is-on-alternatives-to-standardized-testing/>
- Porter, T., & Shebby, S. (2021, September 1). Step by step: 3 steps to reconnect with disengaged students. *ASCD*. <https://www.ascd.org/el/articles/step-by-step-3-steps-to-reconnect-with-disengaged-students>
- Porter, T., Good, K., & Shebby, S. (2021, May 3). Using the three “D’s” of data with educators: Demystify, democratize, and demonstrate. *American Evaluation Association (AEA) 365: A Tip-A-Day By and For Evaluators*. <https://aea365.org/blog/prek-12-ed- eval-tig-week-using-the-three-ds-of-data-with-educators-demystify-democratize-and- demonstrate-by-tameka-porter-kim-good-susan-shebby/>
- Porter, T., & Holquist, S. E. (2021). Come and talk to me: An exploration of culturally responsive communication and decision-making practices at predominantly white institutions and historically

- Black colleges and universities during the COVID-19 pandemic. *The Journal of Higher Education Management*, 36(1), 175–188. https://issuu.com/aaua10/docs/twin_pandemics
- Shebby, S., & Porter, T. (2021). Moving from absent to present. *Educational Leadership*, 78(6), 76–77.
- Vargas, S., & Porter, T. (2021, February 23). Columbus who? Uprooting anti-Blackness through decolonizing Black history curriculum. *Forum of the American Journal of Education*. <https://www.ajeforum.com/columbus-who-uprooting-anti-blackness-through-decolonizing-black-history-curriculum-by-shirley-vargas-and-tameka-porter/>
- Porter, T., Harris, D., Rembert, K., & Batista, S. B. (2021, January 14). Tackling the ‘taboo’ of talking about race and privilege. In L. Ferlazzo (Ed.), *Classroom Q&A with Larry Ferlazzo*. Education Week. <https://www.edweek.org/leadership/opinion-tackling-the-taboo-of-talking-about-race-privilege/2021/01>
- Rembert, K., Harris, D., & Porter, T. (2020, December 4). *Racism in the classroom: What white educators can do to help* [Audio podcast]. <https://larryferlazzo.edublogs.org/2020/12/04/my-latest-bam-radio-show-is-on-racism-what-white-educators-should-do-about-it/>
- Porter, T. (2020, June 22). Reflecting on teacher wellbeing during the COVID-19 pandemic. *Institute of Education Sciences*. https://ies.ed.gov/ncee/edlabs/regions/pacific/blogs/blog28_reflecting-on-teacher-wellbeing-during-COVID-19-pandemic.asp/
- Holquist, S. E., & Porter, T. (2020, June 3). Culturally responsive leading and learning: Addressing equity through student and family voice. *Institute of Education Sciences*. https://ies.ed.gov/ncee/edlabs/regions/pacific/blogs/blog27_culturally-responsive-leading-and-learning-addressing-equity.asp/
- Porter, T., Cook, H. G., & Sahakyan, N. (2019). *Less than four domains: Creating an overall composite score for English learners with individualized education plans* (WCER Working Paper 2019-3). https://wcer.wisc.edu/docs/working-papers/Working_Paper_No_2019_3.pdf
- Porter, T., Sato, E., Stewart, K., & Farley, D. (2019, June 24–26). *Approaches to the peer review process: Perspectives from two English Language Proficiency Assessment Consortia* [Panel presentation]. National Conference on Student Assessment, Orlando, FL, United States.
- Porter, T. (2019, April 5–9). *The truth about affirmative action: What it is, what it means, and how it helps* [Conference presentation]. American Educational Research Association, Toronto, ON, Canada.
- Porter, T. (2019, February 25–26). *Supporting states in establishing reclassification and exit criteria for attaining English language proficiency* [Conference presentation]. Academic Research in Education Annual Meeting, Las Vegas, NV, United States.
- Porter, T. & Wilde, J. A. (2018, October). *So you want to be a university president* [Conference presentation]. Harvard Faculty Club National Women in Leadership Conference, Cambridge, MA, United States.
- Porter, T. (2018, April 13–17). *The mismatch myth and other affirmative action considerations* [Conference presentation]. American Educational Research Association, New York, NY, United States.

Obioma C. Okogbue

Proposed Role: TA Provider and Content Expert

TA Specialist, Child Trends

 | OOkogbue@childtrends.org

Obioma Okogbue, M.Ed., M.A., is an experienced technical assistance provider who partners with schools, districts, state education and health agencies, and community-based organizations to support their capacity building and systems improvement efforts using an equity-centered approach. Ms. Okogbue serves as a project director and TA provider for the CDC-funded Leadership Exchange for Adolescent Health Promotion (LEAHP) and in this role, she manages the project and designs and provides capacity building supports to state education agencies and state health departments to develop and implement strategic plans to advance adolescent health in schools, with a focus on health education, health services, and safe and supportive environments. Additionally, she serves as a project co-director and technical assistance lead for The National Technical Assistance Center for the Education of Children and Youth who are neglected, delinquent, or at-risk (NDTAC), which is a national resource and technical assistance center that provides direct assistance to states, schools, communities, and parents seeking information on the education of children and youth who are considered neglected, delinquent, or at-risk. Ms. Okogbue has also served as the subcontract project director and provided support for Child Trends' work to support the Title IV, Part A TA Center focused on student support and academic achievement. As part of the team, Ms. Okogbue was responsible for providing background information on the TA Center, analyzing and reporting needs assessment data, informing and developing TA products and training for Title IV, Part A state coordinators, and identifying resources and subject matter experts. Ms. Okogbue continues to work with states across the country on implementing their federal programs and improving policies that impact the lives of children and youth and remains deeply connected to her TA clients and their communities.

Primary areas of expertise

- Education workforce development
- School improvement
- School climate
- Implementation science
- Student engagement

Directly related project experience

Community Schools Funding Analysis

2022

Agency/firm | Child Trends

Roles: Policy and Data Analyst

Okogbue served as a policy and data analyst for this funding analysis for community schools to understand the current funding landscape and the opportunities to expand community schools in Boston. This project was designed to help the city of Boston, including the Superintendent of Boston Public Schools, amongst other stakeholders, understand how they could fund community school activities including out of school time programs using federal or foundation funding. This project provided an in-depth funding analysis for community schools that was carried out in three stages: 1) a review of the current literature on funding including state and local reports, 2) the development of a

community schools funding survey to guide structured interviews of four urban local education agencies (LEAs), and 3) an analysis of current and potential funding sources and approaches for funding community hub schools in Boston, Massachusetts. Okogbue was responsible for conducting an extensive review of ESEA as amended by ESSA to determine which federal education policies would fund parts or all of a community school implementation and expansion. Results from the project showed the different ways that community schools could be sustainable scaled and funded.

The National Technical Assistance Center for the Education of Neglected or Delinquent Children and Youth **2020–Present**

Agency/firm | Child Trends

Roles: Subcontract Project Director

Okogbue serves as the subcontract project director and a technical assistance lead for this national resource and technical assistance center that provides direct assistance to states, schools, communities, and parents seeking information on the education of children and youth who are considered neglected, delinquent, or at-risk. NDTAC focuses on helping states improve the educational achievement and post-secondary outcomes of youth involved in the juvenile justice and child welfare systems. As a TA lead, Okogbue works with SEAs to build their capacity through designing and delivering direct technical assistance services to SEAs. She supports stakeholders in adopting and collecting new ESEA data indicators and using data in decision making, engages families and communities in decision making, addresses educator recruitment and retention, implements high-quality teaching and learning practices for underserved youth, promotes staff wellness, improves collaboration within SEAs to provide wraparound supports for students, and creates safe and supportive learning environments. Learnings from this project provide insights into how SEAs can develop sustainable policies and practices to improve outcomes for promising youth. This project is being conducted in partnership with Longevity Consulting.

Implementation Support for the Youth Bullying Prevention Act **2020–2021**

Agency/firm | Child Trends

Roles: Implementation Support

Okogbue served as an implementation support for the DC Office of Human Right's (OHR) implementation of the Youth Bullying Prevention Act where she provided support on technical assistance products. The support provided to DC schools and the DC OHR included compliance analysis of bullying policies from DC Youth Serving Agencies and Schools, annual data collection and analysis, and technical assistance products. Results from this ensure that all DC Youth Serving Agencies have policies, procedures, and a contact person to address bullying in all its forms and ensures that students feel a sense of safety and belonging.

Extending the reach, utility, and equity focus of policies to support healthy school environments among key stakeholders **2019–2022**

Agency/firm | Child Trends

Roles: Policy Analyst

Okogbue served as a policy analyst on this project that aimed to relaunch the NASBE State Policy Database on School Health and use push and pull communication strategies to share the importance of supporting healthy schools through state policy. Okogbue was responsible for updating and coding a policy database that is based on the CDC Healthy Schools Whole School, Whole Community, Whole Child (WSCC) framework. This project led to the update of the NASBE School Health Database that covers codified and noncodified policies enacted as of September 2019 in all 50 states, the District of Columbia,

Guam, and the U.S. Virgin Islands that applied to public schools and the general education population. These policies have implications for improving student health, wellbeing, engagement, and belonging, and reducing chronic absenteeism.

Promoting Adolescent Health through School-Based HIV Prevention: Addressing policy and practice in states **2018–2024**

Agency/firm | Child Trends

Roles: Project Director and Technical Assistance Provider

Okogbue served as the project director and a TA provider to bring together and align SEAs and state health agencies to implement policy and practice change. This five-year project consists of providing capacity building supports to SEAs and state health departments to develop and implement strategic plans to advance adolescent health in schools, with a focus on health education, health services, and safe and supportive environments. Participants received intensive, one-on-one technical assistance for two years and were invited to participate and access an online learning system, virtual learning community sessions, and webinars for the duration of the project even after their two years of intensive supports ended. Nearly every state team continued to engage after their two years of intensive supports ended. The project spanned the years of COVID pandemic response and while participants experienced challenges in implementing their plans, they also reported that the cross-sector collaboration they engaged in through the project resulted in more effective pandemic responses in their states and sustainable supports for all students, especially LGBTQIA+ students. This project is being conducted in partnership with the National Coalition for STD Directors. As a part of the pandemic response, Child Trends received additional funding to develop a toolkit to support LEAs in advancing school employee wellness. The toolkit is grounded in implementation science with a strong focus on equity. Since launching the toolkit online in late September 2023, the webpage has received more than 6,500 visits.

Title IV, Part A, Technical Assistance Center

2018–2023

Agency/firm | Child Trends

Roles: Subcontractor Project Director

Okogbue served as the subcontract project director and provided support to the Title IV, Part A TA Center. The T4PA Center operates on behalf of the U.S. Department of Education, Office of Safe and Supportive Schools and provides SEAs with dedicated support for implementing the Title IV, Part A Student Support and Academic Enrichment program. Okogbue was responsible for providing background information on the TA Center, analyzing and reporting needs assessment data, and informing and developing TA products and training for Title IV, Part A state coordinators, identifying resources and subject matter experts. She supported stakeholders in reading and understanding education research, conducted needs assessment at the LEA level and allocating resources, provided high quality professional development, supported special student populations including students with disabilities and English learners, provided accelerated learning opportunities, engaged parents and families, supported LEAs to adopt evidence based program using implementation science, and publicly reported on outcomes, amongst other subject matters. Learnings from this project provide insights into how SEAs can support LEAs in designing programs and adopting practices that support students in improving their academic achievement. This project was conducted in partnership with Synergy Enterprises.

Studying the impact on school health services and health equity of state policy on whether schools can bill Medicaid for health care free to students **2018–2020**

Agency/firm | Child Trends

Roles: Research Analyst

Okogbue 3

Okogbue served as a research analyst for the implementation evaluation of Medicaid reimbursement in different states. This two-year project examined changes in Medicaid reimbursement for school-based health services and included an analysis of changes in Medicaid billing as well as interviews with state, district, and school leaders in early adopter states to examine the challenges and successes they experienced. Findings demonstrated the importance of early and frequent cross-sector collaboration to ensure that school and district staff were able to effectively leverage Medicaid as a sustainable source of funding for school mental health services.

Professional experience

Child Trends	2019–Present
<i>Technical Assistance Specialist I</i>	<i>2022–Present</i>
<i>Senior Technical Assistance Analyst</i>	<i>2019–2022</i>
Council for Equity and Community, Lehigh University	2018–2019
<i>Graduate Assistant</i>	
Seed of Messiah Nursery/Primary School	2016–2017
<i>Administrative Officer</i>	
Seed of Messiah Nursery/Primary School	2013–2016
<i>Subject Teacher (French)</i>	

Education

M.A., Comparative and International Education, Lehigh University	2019
M.Ed., Educational Leadership, American College of Education	2017
B.A. (First Honors), French, Covenant University	2013

Publications and Presentations

Chan, K., & Okogbue, O. (Forthcoming). Voices from the field: Program Feature on the Intersection of Title I, Part D; McKinney-Vento Act; and Title I, Part A-Foster Care. Washington, DC: National Technical Assistance Center for the Education of Neglected or Delinquent Children and Youth (NDTAC).

Chan, K., & Okogbue, O. (2024). Voices from the field: A spotlight on Neglected Facilities. Washington, DC: National Technical Assistance Center for the Education of Neglected or Delinquent Children and Youth (NDTAC).

Sacks, V., Sanders, M., & Okogbue, O. (2022). District leaders’ strategies for funding and implementing community schools. Bethesda, MD: Child Trends.

Okogbue, O., Sanders, M., Angeles-Figueroa, J., & Sacks, V. (2022). Recent funding approaches and sources for community schools. Bethesda, MD: Child Trends.

Chown, M., Guros, C., & Okogbue, O. (2021). *Title I, Part D, State Coordinator’s Orientation Handbook: 2021 Edition*. Washington, DC: National Evaluation and Technical Assistance Center for Children and Youth Who Are Neglected, Delinquent, or At-Risk (NDTAC).

Okogbue, O. & Stratford, B. (2020). *Licensure Requirements Can Hinder Medicaid Reimbursement for School-based Mental Health Services*. [Blog]. Bethesda, MD: Child Trends.

- Wilkinson, A., Gabriel, A., Stratford, B., Carter, M., Rodriguez, Y., Okogbue, O., Somers, S., Young, D., & Harper, K. (2020). *Early Evidence of Medicaid's Important Role in School-based Health Services*. Bethesda, MD: Child Trends.
- Jacob, I., Temkin, D., Rodriguez, Y., Okogbue, O., Greenfield, S., & Roemerman, R. (2020). *Setting the Foundation for Safe, Supportive, and Equitable School Climates*. Bethesda, MD: Child Trends.
- Child Trends (2020). *Reading and Understanding Education Research*. For the Title IV Part-A Technical Assistance Center. [Primary author]
- Child Trends (2020). *Evaluating the Effectiveness of Professional Development*. For the Title IV Part-A Technical Assistance Center. [Contributing author]
- Child Trends (2020). *Technical Assistance Protocol for the Leadership Exchange for Adolescent Health Promotion (LEAHP)*. [Contributing author]
- Davidson, P.M., Park, M., Dzotsenidze, N., Okogbue, O., & Wiseman, A.W. (2019). The osmosis of comparative and international education: What, how, and why CIE research appears in non-CIE journals. In A.W. Wiseman (Ed.), *Annual Review of Comparative and International Education 2018*. Bingley, UK: Emerald Group Publishing Limited.
- Altidor, C., Bolander, P., Guros, C., Okogbue, O., & Szydlowski, M. (2024, June). *Yes You Can! Strengthening Adolescent Sexual Health Services through Partnerships* [Conference presentation]. STI Engage, Washington, D.C.
- Okogbue, O., & O'Toole, D. (2023, October). *Spending Title I, Part D Funds* [Conference presentation]. Pennsylvania N&D Symposium, Poconos, PA.
- Denny, H., Goodwin, J., Rudolph, L., Sommer, E., & St. John, V. (2023, August). *Experiences of Homelessness Among Youth Involved in the Criminal Justice System* [Webinar]. O. Okogbue (Moderator), National Technical Assistance Center for the Education of Neglected or Delinquent Children and Youth (NDTAC).
- Denny, H., Okogbue, O., & Spitz, D. (2023, May). *Planning to Spend Title I, Part D Funds* [Conference presentation]. NDTAC Annual Conference, Washington, DC.
- Bumbarger, B., & Okogbue, O. (2023, February). *Use of Title I, Part D Funds* [Webinar]. National Technical Assistance Center for the Education of Neglected or Delinquent Children and Youth (NDTAC).
- Okogbue, O., (2020, March). *Digital Inequality and Social Exclusion: A Study of Germany's Adoption of the European Commission Digital Education Action Plan* [Conference presentation]. Comparative and International Education Society, Miami, FL. (Conference canceled).
- Davidson, P.M., Park, M., Dzotsenidze, N., Okogbue, O., & Wiseman, A.W. (2019, April). *Reflections on the field of Comparative and International Education* [Conference presentation]. Comparative and International Education Society, San Francisco, CA.

Rebecca Jones

Proposed Role: TA Provider and Content Expert

TA Specialist, Child Trends

 rjones@childtrends.org

Rebecca Jones, M.A., is an experienced researcher with expertise in project management and qualitative and quantitative data collection and analysis, combined with practical experience in the education sector working in the New York City Department of Education and as a seventh-grade teacher in Tulsa, Oklahoma. Ms. Jones is currently the task lead for intensive technical assistance support for the Chan Zuckerberg Initiative's Innovation to Evidence portfolio.

Ms. Jones was previously the task lead for Youth Invest Partners' (formerly Venture Philanthropy Partners) Boys and Young Men of Color Collective Action Network. She provided Youth Invest Partners with support on agenda setting for a collaborative network of school leaders, government officials, nonprofit leaders, and funders in their effort to reestablish the My Brother's Keeper Initiative in Washington, DC. Ms. Jones provided thought leadership and facilitated conversations around data and the development of the network's common outcomes framework.

Ms. Jones also conducted a review of research focusing on implementation and outcome studies on integrated student support models; provided support to the State of Washington in their efforts to implement integrated student support models as a part of Washington's 4SHB 1541; led the collection and analysis of over 100 interviews with YMCA staff members for an evaluation of the YMCA of the USA's implementation of the Character Development Leadership Institute, an effort to incorporate positive youth development practices in their summer and afterschool programming; and collected and analyzed data from almost 60 interviews for an NIJ-funded grant examining the application of youth development research in the juvenile court system. Her other experience in data collection includes conducting site visits and classroom observations, interviewing school staff and students, and redeveloping a fidelity monitoring tool to assess the implementation of a teen pregnancy prevention curriculum.

Previously, Ms. Jones worked as a project manager at the New York City Department of Education. There, her role combined project management and evaluation support for a cross-office team that provided tailored support to 247 schools and offered professional learning opportunities to all school staff in New York, New York. Prior to that, she also worked as a middle school math teacher in Oklahoma and supported new teacher training by observing and providing regular feedback to a cohort of new teachers.

Primary areas of expertise

- School climate and safety
- School improvement
- Math instruction
- Improvement science
- Implementation science

Directly related project experience

Innovation to Evidence

2022-2025

Agency/firm | Child Trends

Roles: Task Lead for Intensive Technical Assistance

Jones is the task lead for intensive and individual technical assistance support for the Chan Zuckerberg Initiative's Innovation to Evidence portfolio. Jones manages all intensive and individualized technical support activities, including developing technical assistance plans and coordinating staffing to meet grantees' needs. The three main goals of the portfolio are to 1) identify examples of practices that lead to learning environments that are centering and elevating racially affirming relationships for Black, Brown, and Indigenous students, 2) support co-construction efforts that are authentically engaging families, students, and educators to implement and/or improve these learning environments, and 3) support the development of research of these efforts, also rooted in co-construction, to generate new bodies of evidence for promising practices. Findings from this project demonstrate the efficacy of a collaborative network model, utilizing improvement and implementation science practices, in supporting innovation teams to design, implement, and evaluate innovative interventions aimed at enhancing student success. Dissemination products thus far include four published practice guides.

VPP Research and Evaluation Support

2023-2023

Agency/firm | Child Trends

Roles: Task Lead for Boys and Young Men of Color Collective Action Network

Jones served as the task lead for Youth Invest Partners' (formerly Venture Philanthropy Partners) Boys and Young Men of Color Collective Action Network. Youth Invest Partners requested Child Trends' research and evaluation support to provide thought leadership in youth development, early childhood, child welfare, reproductive health and family formation, education, juvenile justice, social emotional learning, parenting, mental and physical health, poverty, workforce development, boys and young men of color, and racial equity. This support included gathering data, conducting analyses, and preparing and delivering data presentations to engage regional stakeholders, including K-12 school district and community college officials, youth-serving program leaders, and funders, among others. This project culminated with a local action summit that brought together young men from Washington, D.C., and nonprofit community partners to discuss community safety.

Understanding School Climate for American Indian Youth: A CPBR Case-Study Approach

2018-2023

Agency/firm | Child Trends

Roles: Project Director

Jones served as the project director for a five-year community-based participatory research study in collaboration with a tribal community in the southwestern United States. This National Institute of Justice grant aimed to examine American Indian youth's perspectives on school climate and safety at Tribal and non-Tribal schools. This project was conducted in partnership with the Center for Native American Youth. Findings from this report are included in a photovoice project created by youth in the tribal community and a report highlighting the experiences of youth and their schoolteachers in their tribal school.

Evaluation of the Ready for Work Initiative in Prince George's County, MD

2016-2022

Agency/firm | Child Trends

Roles: Project Director and Lead Analyst

Jones served as the project manager, then later project director and lead analyst for an evaluation of Venture Philanthropy Partners' (VPP, now Youth Invest Partners) Ready for Work initiative in Prince

Jones 2

George’s County. In this project, VPP funded and convened resources, including youth-serving organizations, to improve college and career readiness among youth in the county. As project director and lead analyst, Ms. Jones developed timelines and strategies for effective practices for collecting in-person survey data from more than 1,000 individual students over the course of three academic school years. Additionally, she analyzed survey data, drafted reports, developed data visualizations, and facilitated “data walks” for school staff and administrators and nonprofit organization staff. Findings from this project highlight effectiveness of integrated student supports as an approach to improving socioemotional learning outcomes, and as a byproduct, academic outcomes for students in underperforming schools in Prince George’s County, Maryland.

Integrated Student Supports **2016-2017**

Agency/firm | Child Trends

Roles: Analyst

Jones serves as an analyst for the update to Child Trends’ influential 2014 review of the evidence base for Integrated Student Supports and shared findings with media and the education and policy communities. The update served to inform state decisions related to ESSA. Jones supported impact evaluations and cost-benefit analyses, deepening the understanding of ISS and its potential and eliciting more interest in communities across the country in the status of the evidence and practice of ISS. Findings from this review added more evidence to the potential for community and school partnerships that provide supports for students with needs beyond the scope of the instructional classroom environment.

Professional experience

Child Trends	2016–Present
<i>Technical Assistance Specialist I</i>	2023–Present
<i>Senior Research Analyst</i>	2019–2023
<i>Research Analyst</i>	2016–2018
New York City Department of Education	2015–2016
<i>Project Manager, Evaluation, Knowledge Sharing, and Strategy Team</i>	2015–2016
<i>Program Associate, Learning Partners Program</i>	2015
Community College Research Center, Columbia University	2013–2015
<i>Research Assistant</i>	
Leadership for Educational Equity	2013
<i>Policy, Advocacy, and Organizing Fellow</i>	
National Association for Equal Opportunity in Higher Education	2012–2013
<i>Internship Coordinator and Research Associate</i>	
Tulsa Public Schools	2010–2012
Faculty Advisor, Teacher for America	
<i>Middle/Junior High School Teacher (Mathematics)</i>	

Education

M.A., Politics and Education, Columbia University	2015
B.A. (Magna Cum Laude), Public Relations, Clark Atlanta University	2010

Publications and Presentations

- Rackers, H.S., Jones, R.M., Sacks, V., Redd, Z., & Moore K.A. (2022). *The youthCONNECT integrated student supports model shows a relationship between caring adults and student's academic outcomes*. Child Trends.
- Murphy, K., Carney, M., Jones, R.M., & Peckoo, S. (2023). *Understanding drivers of juvenile justice transformation efforts: An in-depth examination of the Virginia Department of Juvenile Justice's Regional Service Coordination Model*. Manuscript in preparation.
- Murphy, K., Hickman, S., & Jones, R.M. (2021). Looking Up at the Ivory Tower: Juvenile Court Judges' and Attorneys' Perceptions of Research Use. *Journal of Research in Crime and Delinquency*. DOI: 10.1177/0022427821990878.
- Sacks, V., Jones, R.M., Redd, Z., & Moore K.A. (2020). *Data sharing, incentives, and relationship building are critical components of using data to support student success*. Child Trends.
- Sacks, V., Jones, R.M., Redd, Z., & Moore K.A. (2020). *Relationships with Caring Adults and Social and Emotional Strengths Are Related to High School Academic Achievement*. Child Trends.
- Sacks, V. & Jones, R.M. (2020). *Nonprofit organizations and partnerships can support students during the COVID crisis* [Blog Post]. Child Trends.
- Moore, K.A., Lantos, H., Jones, R.M., Schindler, A., Belford, J., & Sacks, V. (2017). *Collaborative solutions for reaching the whole child: The state of the research on integrated student supports*. Child Trends.
- Harper, K., Jones, R.M., & Katz, E. (2018). *Research shows the need for continued federal leadership on school discipline* [Blog Post]. Child Trends.
- Stratford, B., Lantos, H., Redd, Z., DeMand, A., Peckoo, S., Jones, R.M., Winslow, H., Bradley, M., & Beckwith, S. (2018). *The YMCA of the USA's Character Development Learning Institute: Findings from the Pilot Phase Evaluation* [Report]. Child Trends. Report prepared for the YMCA of the USA.
- Jones, R.M., DeMand, A., Sacks, V., Redd, Z., & Moore K.A. (2018). *Suitland High School Ready for Work Survey, Spring 2018* [Report]. Child Trends. Report prepared for Prince George's County School District, Department of Testing, Research and Evaluation.
- Sacks, V., Jones, R.M., Redd, Z., & Moore K.A. (2018). *Suitland High School Ready for Work Survey, Fall 2017* [Report]. Child Trends. Report prepared for Prince George's County School District, Department of Testing, Research and Evaluation.
- Jones, R., Gordon, H.S.J., Around Him, D., Kipp, B.J., Meyer, A.L, Carlos, M., & Brady, C. (2022, October). *Conducting Research and Evaluation in a Good Way with Indigenous Nations and People: Bridging Indigenous and Western Rigor* [Webinar]. American Evaluation Association. Indigenous Peoples in Evaluation Topical Interest Group.

Jones, R., Sacks, V., Bradley, M. & Carney, M. (2021, May). *Lessons learned collecting and using data in a school setting: the value of relationships and input from partners* [Conference presentation]. Easter Evaluation Research Society (EERS) 2021 Conference (Virtual).

Jones, R. (2018, February). *Collaborative solutions for reaching the whole child: The state of the research on integrated student supports* [Conference presentation]. The Society for Research on Educational Effectiveness (SREE) 2018 Conference, Washington, DC.

ATTACHMENT

Resumes for On-Call Subject Matter Experts

Shelby Cooley

Rose Honey

Kaily Bunch-Woodson

Emily Rang

Barbara Adams, project lead for Alaska's Addressing Educator Shortages project

Christina Linder

Jessica Newman

Darris Means

Sarah Powell

Rolanda Baldwin

Marguerite Roza

David Donaldson

Cecelia Long

Amaya Garcia

Nancy J. Nelson

Lynn Holdheide

Anne Hyslop

Shelby P. Cooley

Senior Fellow

Applied Research and Equitable Evaluation

shelby.cooley_sf@ednw.org



Primary areas of expertise

- Mixed-methods and participatory design
- Black child social development and well-being
- Re-engagement and postsecondary transitions

Directly related project experience

Elevate Youth California (EYC) Evaluation

2023 – 2024

California Dept of Health Care Services (DHCS) and Sierra Foundation | Role: Lead

I lead a multi-year evaluation of Elevate Youth California (EYC) a consortium of youth-serving organizations funded by DHCS and convened by the Sierra Health Foundation. EYC is a statewide initiative addressing substance use disorder by investing in youth leadership and civic engagement for youth of color and 2S/LGBTQ+ youth ages 12 to 26 living in communities disproportionately impacted by the war on drugs. The evaluation includes 290 programs across California and is grounded in culturally responsive evaluation and appreciative inquiry. These frameworks and the partnership's foundation in the social drivers of health have informed the methods, engagement, and learning structures. The evaluation uses participatory methods, particularly during youth data collection with youth photovoice focus groups and an advisory group of youth and program staff provide the evaluation feedback on implementation to minimize the burden of program participation, provide inference on findings, co-design learning sessions, and work to ensure information is actionable for practitioners. Given the variance in program service delivery, we designed a learning phase with staff and youth to revise the existing logic model so the evaluation and progress monitoring would be driven by a common, youth-informed logic model.

Professional experience

King County Department of Community and Health Services, Seattle, WA

2024 – present

Data and Evaluation Lead

Supports the Children Youth and Young Adult Division's evaluation team with community collaborative research, internal evaluation, provider engagement, communication, and accountability reporting for King County's youth investments in childcare, youth development, restorative justice, and transitions to postsecondary (e.g., Best Starts for Kids and the Puget Sound Taxpayer Accountability Account).

Education Northwest, remote

2023 – present

Senior Fellow

Provides institutional and technical knowledge, research design, and communication support for select Washington State projects on equity in education, students of color, and transitions to adulthood.

Principal Researcher

Led mixed-methods research, evaluation, and technical assistance projects supporting districts and statewide agencies in Washington and California. The project portfolio focused on equitable evaluation, youth leadership, and postsecondary transitions. Designed and managed projects, client relationships, budgets, staffing, and community advisory groups. Supported organizational equity resources.

Seattle University, Seattle, WA**2023 – present***Adjunct Faculty*

Adjunct in the College of Education, teaching *Advanced Research Methods* within the Ed.D. program – Doctorate in Educational and Organizational Learning and Leadership. Prepares lectures, discussions, and assignments focused on formative and summative evaluation, action research, measure development, data stewardship, cultivating organizational cultures of inquiry, and public accountability.

Seattle Public Schools, Seattle, WA**2021 – 2023***Senior Research Associate*

Led mixed-methods research and evaluation projects supporting strategies in early learning, college readiness, school climate, enrollment equity, and methods that center students and families of color – e.g., youth participatory action research and design-based inquiry. Supports department strategy, leads process documentation, research communication, report production, accountability workgroups, university practice partnerships, and asset-based measurement. (N = 56, 232, PreK-12th)

Community Center for Education Results (CCER), Seattle, WA**2016 – 2021***Research Director***2018 – 2021**

Developed the collective-impact non-profit's research function and team. Cultivated community and university partnerships and led a portfolio of collaborative studies to inform partner strategy and decision-making. Led team in designing, conducting, and communicating research using large-scale, secondary data and novel, mixed methods design. CCER supports the Road Map Project initiative in South King County, WA (N = 415,486 PreK – postsecondary students from 2010-2021).

*Research Scientist***2016 – 2018**

Led mixed-methods studies and research using CCER's PreK-postsecondary, longitudinal, administrative database for reporting, evaluation, and ad-hoc projects to support K12 districts, WA state and community-led strategies. The research examined school climate, racial identity, school mobility, opportunity youth, and barriers to postsecondary attainment. Managed research assistants, developed team documentation, wrote reports, developed interactive data dashboards, and communicated complex findings to multi-sector partners.

Child Trends, Bethesda, MD**2013 – 2015***Field Staff Researcher*

Supported the multi-year District of Columbia Public Schools (DCPS) Early Childhood Program Evaluation, examining the impact of Head Start CARES on later-grade learning outcomes in all Title 1 schools. Trained new staff and supported reliability and fidelity tests for multiple observation tools. Conducted classroom observations using the Classroom Assessment Scoring System (CLASS: Piñata et al., 2008) and Tools of the Mind®. Assessed PreK-2nd graders' literacy and mathematics skills, inhibitory control, working memory and social-emotional development. Wrote observation-based summaries for teacher professional development (N = 1,200). | Dr. Tamara Halle (P.I.).

CNN Anderson Cooper 360°, New York, NY**2011***Co-consultant and Research Manager*

Consultant for CNN AC360° on [“Kids on Race: The Hidden Picture”](#) a research series commissioned to Dr. Melanie Killen. The project involved individually interviewing 6- to 13-year-olds (N = 145) about interracial bias and friendship. Developed protocols, and conducted pilot testing, data analyses, reports, and on-air interviews. Kerry Rubin, Executive Director, CNN America, Inc., One Time Warner Center.

University of Maryland, College Park, MD**2010 – 2015***Research Lab Manager*

Research manager leading survey and interview instrument creation, IRB process, team training, coding reliability, quantitative analysis, and manuscript writing. Research on social group attitudes and the impact of stereotypes on Asian American youth (N = 480), intergroup contact in early childhood and attribution of intentions (N = 145), social reasoning about exclusion in middle childhood (N = 400), and

young children’s judgments of group dynamics ($N = 73$). National Science Foundation. | Dr. Melanie Killen (P.I.).

New York University, New York, NY

2009 – 2010

Research Assistant

Conducted cognitive assessments using Woodcock-Johnson®, 1st-3rd grade classroom observations using the CLASS (Piñata et al., 2008), and supported lab training. Evidence-based intervention study examined how teachers ($N = 122$), low-income families of color ($N = 345$), and integrated home-classroom curricula support social-emotional and academic outcomes. Institute of Education Sciences and The National Institute of Nursing Research, INSIGHTS Lab. | Dr. Sandee McClowry (P.I.).

Teacher Consultant

Implemented systematic observation of kindergarten and 3rd grade integrated classrooms using the CLASS (Piñata et al., 2008), Behavioral Observation of Students in Schools (BOSS: Shapiro, 2004) and consultation framework. Consulted one-on-one with a cohort of special education teachers. Community-participatory study examined school-based mental health programs at Title I elementary schools and a consultation model for improving student learning. National Institute of Mental Health, BRIDGE Project. | Dr. Elise Cappella (P.I.).

Education

Ph.D. Child Development, University of Maryland, College Park, MD.

2015

B.A., Psychology & Black Studies, Scripps College, Claremont, CA.

2009

Select Publications

Public Reports

Cooley, S. & Williams, M. (2024). *Seeding success: The story of the Office of African American Male Achievement*. Seattle Public Schools, Seattle. WA.

Cooley, S., McLennan, D., Hodara M., & Fujita-Conrads, E. (2023). *Open Doors program profiles: Federal Way Open Doors; Fresh Start Tacoma; Gravity ESD 113*. Education Northwest.

Petrokubi, J., Cooley, S., Fujita-Conrads, E., Hodara, M., & McLennan, D. (2023). *Community partnerships for reengagement initiative summary report*. Education Northwest.

Williams, M., Cooley, S., LeClair, Z., Alemayehu, D., Sailiai, A., Page, N., et al. (2022). *Deepening educator and system practices for student and family voice: insights from AAMA’s Early Literacy Collaborative*. Seattle Public Schools, Seattle WA.

Cooley, S., Jones, K., Ammon-Ciaglo, R., Xiao, J., Haizlip, A., Williams, M., & Fajardo, I. (2022). *Mentorship matters: Preliminary results from the Kingmakers of Seattle program evaluation*. Seattle Public Schools, Seattle WA.

Cooley, S., Byrdo, N., Williams, M. (2021). *Our voice, our vision: Strategies for honoring and supporting Black excellence in Seattle Public Schools*. Seattle Public Schools Office of African American Male Achievement, Seattle, WA.

Chu, B., Rosenblatt, N., Cooley, S., Waits, S., Granlund, C., Grubb, B., et al. (2021). *Inequity by design: How college placement policies perpetuate institutional racism*. Seattle, WA: Puget Sound College & Career Network, Community Center for Education Results, and Highline College.

Yohalem, N., Cooley, S., Guizar, M., Ocana, V., Meshnick, M. (2020). *In their own words: Young people describe the impact of COVID-19*. Seattle, WA: Community Center for Education Results.

Yoshizumi, A., Yohalem, N. & Cooley, S. (2020). *More than dropping out: Understanding factors related to student disengagement in South Seattle and South King County*. Seattle, WA: Community Center for Education Results.

Cooley, S., Pérez, A., Yoshizumi, A., Chu, B. & Avery, K. (2019). *Let us succeed: Student college and career aspirations*. Seattle, WA: Community Center for Education Results.

Cooley, S. (2017). *Start with us: Black students in South King County and South Seattle*. Seattle, WA: Community Center for Education Results. | [Black Student Success Initiative](#)

Cooley, S. (2016). *Washington House Bill 1541 and within group variance among Black/African American students in South Seattle and South King County*. Seattle, WA: Community Center for Education Results.

Killen, M. Cooley, S. Mulvey, K. L., Hitti, A., & Elenbaas, L. (2012). *Kids on race: The hidden picture*. New York, NY: CNN Anderson Cooper 360° Online Data Report.

Peer-Reviewed Articles

Burkholder, A., Glidden, J., Yee, K., Cooley, S. & Killen, M. (2021). Peer and parental sources of influence in interracial and same-race peer encounters. *Journal of Social Issues: Ethnic-Racial Socialization Among Children and Adolescents*.

Hitti, A., Elenbaas, L., Noh, J., Rizzo, M. T., Cooley, S. & Killen, M. (2020). Expectations for cross-ethnic inclusion by Asian American children and adolescents. *Group Processes & Intergroup Relations*. doi. 10.1177/1368430219851854

Cooley, S., Burkholder, A. & Killen, M. (2019). Social inclusion and exclusion in same-race and interracial peer groups. *Developmental Psychology*, 55(11), 2440–2450. doi. 10.1037/dev0000810

Cooley, S., (2018). "We are more than one box": How racial identity, bias, and climate impact adolescents of African descent. *Washington Education Research Association Journal*, 10(2), 16-27.

Rizzo, M. T., Cooley, S., Elenbaas, L. & Killen, M. (2017). Young children's inclusion decisions in moral and social-conventional group norm contexts. *Journal of Experimental Child Psychology*, 165, 19-36. doi. 10.1016/j.jecp.2017.05.006

Rizzo, M. T., Elenbaas, L., Cooley, S. & Killen, M. (2016). Children's recognition of fairness and others' welfare in a resource allocation task: Age-related changes. *Developmental Psychology*, 52, 1307-1317 doi: 10.1037/dev0000134

Cooley, S. & Killen, M. (2015). Children's evaluations of resource allocation in the context of group norms. *Developmental Psychology*, 51, 554–563. doi: 10.1037/a0038796

Cooley, S., Elenbaas, L. & Killen, M. (2012). Moral judgments and emotions: Adolescents' evaluations in intergroup social exclusion contexts. *New Directions for Youth Development*, 136, 41-57. doi: 10.1002/yd.20037

Book Chapters

Cooley, S., Elenbaas, L. & Killen, M. (2016). Social exclusion based on group membership is a form of prejudice. In: S. Horn, M. Ruck, L. S., Liben (Eds.), *Advances in child development and behavior, equity and justice in development science series*. Elsevier, Academic Press.

Killen, M., Hitti, A., Cooley, S. & Elenbaas, L. (2015). Morality, development, and culture. In M. Gelfand, C.Y. Chiu, & Y.Y. Hong (Eds.), *Advances in culture and psychology* (pp. 161–220). New York: Oxford University Press.

Killen, M. & Cooley, S. (2014). Morality in the context of intergroup relationships. In M. Killen & J. G., Smetana (Eds.), *Handbook of moral development*, 2nd edition (pp. 340-360). NY: Psychology Press.

Select Presentations

Academic Conferences

LeClair, Z., Cooley, S., Byrdo, N., & Alemayehu, D. (2023, March). What does mobilizing parent power look like in a large school system and how does it become systematized? Paper presented at *Washington Educational Research Association Annual Symposium*, Tacoma, WA.

Burkholder, A. R., Glidden, J., Yee, K., Cooley, S., & Killen, M. (2023, March). Peer and parental sources of influence regarding interracial and same-race peer encounters. Panel at the biennial meeting of *Society for Research in Child Development*, Salt Lake City, UT.

Cooley, S. (2022, June). Co-designing for community and youth-led strategies. In B-K. E. Kim, (Panel Organizer) *Reimagining justice for youth starts with seeking racial justice*. Paper presented at the *Society for Prevention Research*, Seattle, WA.

Cooley, S. & Yoshizumi, A. (2020, April). Variance in identity among adolescents of African descent and perceptions of in-school bias on climate. In *Interrogating notions of identity in African and Caribbean education session*. Paper presented (virtually) at the annual meeting of the *American Education Research Association*, San Francisco, CA.

Yoshizumi, A., Chu, B. & Cooley, S. (2020, April). "Let us succeed": Mixed-methods research and continuous improvement for systems change. In *Discipline and redemption: Grounded perspectives on school reform session*. Paper presented (virtually) at the annual meeting of the *American Education Research Association*, San Francisco, CA.

Cooley, S. (2018, June). Black minds matter: Research and multi-sector collaboration for Black student success. Interactive discussion presented at the biennial conference for the *Society for the Study of Social Issues*, Pittsburgh, PA.

Community Workshops

Cooley, S., (2023, November). Data equity and community voice for impact and system learning. Session presented at the *Washington State Achievement Council Regional Challenge Grantee Summit*, Bellevue, WA.

Cooley, S. Petrokubi, J. (2023, October). High school diploma pathway: Data dive and promising practices. Session presented at the *Open Doors Summit, OSPI Community Partnerships for Reengagement Initiative*, SeaTac, WA.

Cooley, S. (2022, March). Sustaining organizational cultures of inquiry and establishing cross-sector data partnerships: Lessons from local direct service providers, *Southeast Seattle Education Coalition 2021-22 Data Cohort*. Seattle, WA.

Cooley, S., Yohalem, N. Meshnick, M. (2021, May). Their own words: Centering student voice throughout the research process. In *Humanizing the Data Conversation: An Equity Learning Series* by Puget Sound Educational Service District. Renton, WA.

Cooley, Hamidani, Lea, Martinez, Yohalem, & Yoshizumi (2020, July). Paths for change: Youth counter stories of disengagement and reengagement. Paper presented at the *Social Emotional Learning Symposium*, Seattle, WA.

Cooley, S. (2019, July). School climate and discipline among multi-generation African American youth. Lecture for the *Southeast Seattle Education Coalition*, Seattle, WA.

- Cooley, S. & Matthews, M. (2018, February). Linking research with direct service practice to better support local Black youth. Paper presented at the *Annual King County Reengagement Provider Network Institute*, Tukwila, WA.
- Cooley, S. (2018, January). Community-participatory research in social impact. Lecture at the *Social Emotional Learning Research Consortium*, Seattle, WA.
- Cooley, S. (2018, January). School climate, racial identity and bias: How Black youth experience our schools. Paper presented at the Seattle Public Schools and Seattle Alliance for Black School Educators' *My Brother's Keeper Summit*, Seattle, WA.
- Polina, M. & Cooley, S. (2017, October). Leveraging data infrastructure for action. Paper presented at the *Annual StriveTogether Cradle Through College Convening*, Phoenix, AZ.
- Cooley, S. (2017, June). Using Tableau to build community reporting systems. Lecture at *Tableau Foundation*, Seattle, WA
- Cooley, S. & Davison, J. (2017, May). Barriers to postsecondary enrollment and attainment. Interactive Session at 'FullConTech' *Civic Collaboration Invent Session*, Washington Technology Industry Association, Seattle, WA

Volunteer and Memberships

- Education Research Data Center (ERDC) Research Agenda Group, Olympia, WA
Working Group Member and Facilitator
ERDC maintains WA state's database of early learning, K12, postsecondary, and employment records. This cross-sector research group sets a framework of critical questions and ERDC's priority projects for 2023-26. 2023 – *present*
- Washington Education Research Association (WERA), Olympia, WA
Board Member
Elected by statewide, WERA members to serve a 3-year board term. Supports WERA's research communication, statewide resources, annual OSPI-WERA convening, and multi-sector partnerships. 2022 – *present*
- Levy Oversight for Families, Education, Preschool, & Promise (FEPP), Seattle, WA
Committee Member
Provided recommendations on the design and modification of programs funded by the seven-year, \$619 million FEPP investment in Seattle's youth. Monitored portfolio outcomes and investment progress. 2019 – 2021
- Seattle Area Child Development Research Network, Seattle, WA
Co-Organizer
Leads and organizes a monthly multisector learning community of child development researchers representing housing, early learning, policy, social work, and epidemiology, at K12 districts, state, and universities. 2018 – 2021
- Road Map Project Data Advisors Group (DAG), Seattle, WA
Staffer
Led and organized a bi-monthly learning community of data administrators from K12 districts, cities, county, colleges, and housing organizations in South King County for equity alignment and increasing data access. 2015 – 2017



Rose Honey, Ed.D. (Subject Matter Expert)

Summary of Relevant Capabilities and Experience

Rose E. Honey has a distinguished career spanning over 20 years in education policy, research, and evaluation, with a strong focus on indigenous education. She currently serves as a Senior Research & Evaluation Associate at AEM Corporation, where she works with state, tribal, and local education departments on behalf of the U.S. Department of Education. Rose provides technical assistance to over 100 Tribal grantees, developing logic models, analyzing data, and facilitating online communities of practice to support federally funded education initiatives. In addition to her role at AEM, Rose is the founder of the Center for Indigenous Research Curriculum Language & Evaluation, where she collaborates with Native educators to enhance tribally driven education and promote tribal sovereignty.

Directly Related Experience

Senior Research and Evaluation Associate, U.S. Department of Education, AEM | 2013 – Present

Work with State, Tribal, and Local Education Departments on behalf of the U.S. Dept. of Education to track the lifecycle of grants, collect and analyze data required to support legislation, and develop research and evaluation strategies to support federally funded education initiatives.

- Provide technical assistance to over 100 Tribal grantees with the Office of Indian Education
- Develop logic models and leading indicators to build grantee capacity for district and state level grantees
- Develop surveys, analyze data, develop outcome reports, facilitate online Communities of Practice and annual meetings for large data collections and programs such as the Civil Rights Data Collection

Research and Evaluation Projects, Multiple Projects, Multiple Organizations | 1994 – Present

Training Educators to Advance Culture & Heritage Project (TEACH), North Dakota, 2023 – Present

- Work with TMCC personnel to gather program knowledge around Native scholar recruitment, retention, training and completion with the goal to increase Native American educators who are trained in local culture and heritage to serve in LEAs that have a high proportion of Native American students

Accelerating Counselor Education & Student Success Project (ACCESS), North Dakota, 2023 – Present

- Perform external evaluation with university students and project personnel with the goal to increase K-12 mental health service professional capacity in Tribal and rural high need LEAs

Supporting Talent with Aligned Resources for STEM Project (STARS), Montana, 2022 – Present

- Gather data and knowledge from Salish Kootenai College, University of Montana and Montana Technological University college/university students, staff, and project personnel with the goal to increase STEM graduation rates and support transition low-income students into the STEM workforce

Center for Indigenous Research, Curriculum, Language & Evaluation, Montana, 2019 – Present

- Principal Associate and Founder overseeing a not-for-profit organization that partners with Native educators and their communities to serve and strengthen tribally driven education with the goal of promoting tribal sovereignty in education

Voices to Hear Project, Idaho, 2018 – 2022

- Gathered data and knowledge from Coeur d'Alene Tribal students, project staff and the community for evaluation on environmental decision making and podcast development and disseminate findings

Montana Office of Public Instruction, Montana, 2017 – 2021

- Collected, analyzed, and disseminated school level data from schools across the state of Montana



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- Shared findings with regional implementation specialists, building level facilitators and school teams

Hopa Mountain, Inc., Montana, 2009 – 2011

- Gathered knowledge on progress with Blackfeet, Pine Ridge, and Wind River program participants
- Developed research on culturally relevant education, assisted in drafting publications and articles

Research Opportunities in Science for Native Americans, Montana, 2008 – 2010

- Assisted with the Students to Academic Professoriate for American Indians (SAPAI) to support college persistence and completion and organized Indigenous Women in Science Network (IWSN) meeting

Nick Jr., “Dora the Explorer,” Season 5, New York, 2007

- Developed focus group and interview tools specific to Dora the Explorer and Go, Diego, Go! episodes
- Collected, analyzed, and presented pre-school participant evaluation findings to program producers

Transcendent International, New York, 2006 – 2007

- Informed content for a bilingual children’s program that addressed health disparity for underserved populations in NYC, organized pilot research and trained staff on formative research methods

Hypothesis Group, New York, 2005 – 2007

- Consulted with clients including PBS Kids, HIT Entertainment regarding program content and appeal
- Assisted in questionnaire development, focus groups, data collection and report writing

Sesame Workshop, “Sesame Street”, New York, 2005 – 2007

- Gathered viewing and interview data for pre- and post-comprehension of episode content and appeal
- Developed age-appropriate numeracy/literacy activities for use in the Sesame Global Guide

Project Zero, Understandings of Consequence Research Group, Massachusetts, 2003 – 2009

- Analyzed student/teacher interactions in classrooms being taught the nature of causality with units on matter, pressure, density, and electrical circuits using a detailed taxonomy

Oregon Health & Science University, Oregon, 2001 – 2003

- Recruited blind participants, guided them through data collection procedures, collected and analyzed fMRI brain imaging data with the multi-platform software Brain Voyager

University of Oregon, Dept. of Physics, Oregon, 1994 – 1998

- Designed and conducted fluid turbulence experiments in water for senior thesis
- Assisted with organization/facilitation of The International Conference on Low Temp. Physics (LT20)

Curriculum Designer, Editor and Consultant, National Indian Education Association

2021 – Present

Design culturally relevant curriculum for K - 12th grade levels with a focus on creating balanced and healthy lives, historical trauma and Native American military veterans. Example projects:

- Operation Prevention - Good Medicine Bundle: <https://www.operationprevention.com/culture-based-resources#middle>
- Illuminative: <https://illuminative.org/resources/>
- Warriors in Uniform, <https://www.niea.org/warriors-in-uniform>, <http://www.warriorsinuniform.com>
- Illuminating the Contributions of Native American Veteran's in Montana



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Additional Curriculum Design Projects, Multiple Organizations	2005 – 2022
ReDesign, Inc., Massachusetts, 2021 – 2022 <ul style="list-style-type: none"> Designed curriculum with a cohort from across the country to create dynamic, multidisciplinary projects to address equity and justice issues and create curriculum that every young person deserves 	
Honoring Tribal Legacies Project, National Park Service, Nebraska, 2013 – 2021 <ul style="list-style-type: none"> Designed K-12 cultural curriculum focused on Tribes along the Lewis and Clark National Historic Trail Disseminated final materials through conference and seminar presentations and workshops 	
Summer Exploration Senior Program, Connecticut, 2005 – 2006 <ul style="list-style-type: none"> Advised/mentored instructors in curriculum design and teaching high school summer STEM courses Trained and supervised Curriculum Advisors and managed the Curriculum Office 	
Big Big Productions, LLC. “It’s A Big, Big World”, Massachusetts, 2005 – 2009 <ul style="list-style-type: none"> Advised on draft and final scripts focusing on science understanding for 2–5-year-old children Developed curriculum focused on episode content, following National Education Standards 	
Education Practice, Multiple Organizations	2015 - 2019
Harvard Graduate School of Education, Massachusetts, 2007 – 2024 <ul style="list-style-type: none"> Taught graduate level courses focused on informal educational media development for children Assisted course guests from top-notch media organizations such as Sesame Workshop 	
Nk’wusm Salish Language Institute, Montana, 2012 – 2015 <ul style="list-style-type: none"> Designed and taught elementary science course on water quality, chemistry, energy, and astronomy Worked weekly with students to help them to develop their reading and comprehension skills 	
Lincoln Preschool/Playgroup, Massachusetts, 2004 – 2005 <ul style="list-style-type: none"> Developed and taught curriculum covering themes such as cycles, same/different and change Gathered weekly supplies such as pond water, art supplies and worms for lesson plan activities 	
West Maui Science Camp, Hawaii, 2003 – 2005 <ul style="list-style-type: none"> Participated in fund raising through grant proposals and letters to private funders Developed summer science curricula and taught 1st through 8th grade students in weeklong classes 	
United States Peace Corps, Zimbabwe, 1998 – 2000 <ul style="list-style-type: none"> Instructed rural Zimbabwean students aligned with Zimbabwe education standards, proctored exams Managed school art and sports clubs, taught HIV/AIDS education and physical education classes Developed science laboratory and secured supplies and textbooks through private donations 	
Oregon Museum of Science and Industry, Oregon, 1997 – 1998 <ul style="list-style-type: none"> Taught elementary science summer day camps in chemistry, physics, biology, and astronomy Organized, facilitated, and accompanied students on overnight excursions 	
Educational Background	
<ul style="list-style-type: none"> Ed.D., Educational Policy, Leadership, and Instructional Practice, Harvard University, 2013 Ed.M., Mind, Brain, and Education, 2005 B.Sc., Physics, University of Oregon, 1998 	
Professional Affiliations and Fellowships	
<ul style="list-style-type: none"> National Science Foundation, Grant Review Panelist, Arlington, Virginia, 2011 - 2023 Blackfeet Geoscience Workshop, Advisory Board Member, Browning, Montana, 2010 - 2013 	



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- HGSE Alumni of Color Conference, Proposal Committee, Cambridge, Massachusetts, 2008 - 2009
- HGSE Student Research Conference, Proposal Committee Chair, Cambridge, MA, 2005
- Mind, Brain and Education Student Organization, Chair, Cambridge, MA, 2004 – 2005
- Jack Kent Cooke Dissertation Fellowship, Jack Kent Cooke Foundation, 2011 - 2012
- Native American Program Nation Building Fellowship, Harvard University, 2009 - 2010
- NSF Center for Advancement of Informal Science Education (CAISE) Fellow, 2009 - 2010
- Council of Alumni for Social Enterprise (CASE) Fellowship, 2008

Publications and Presentations

- Meholic, S., Honey, R., LaTurner, J. (2023). Profile of State Data Capacity in 2019 and 2020: Statewide Longitudinal Data Systems (SLDS) Survey Descriptive Statistics. Stats in Brief. NCES 2022-051. U.S. Department of Education. Institute of Education Science, National Center for Education Statistics. Retrieved from: <https://nces.ed.gov/pubs2022/2022051.pdf>
- Bloom-Weltman, J., Honey, R., Meholic, S., Fetto, M. (2021). Profile of State Data Capacity in 2018: Statewide Longitudinal Data Systems (SLDS) Survey Descriptive Statistics. Stats in Brief. NCES 2021-126. U.S. Department of Education. Institute of Education Sciences, National Center for Education Statistics. Retrieved from: <https://nces.ed.gov/pubs2021/2021126.pdf>
- Honey, R.E. (2021). Honoring Tribal Legacies: Indian Boarding Schools Along the Trail [online curriculum]. <https://blogs.uoregon.edu/honoringtriballeacies/teachings/elementary/indian-boarding-schools-along-the-trail/>
- Honey, R.E., Buswell, C. & Doyle, S. (2016). Our Nation's Native Peoples. National Park Foundation. Every Kid in a Park Initiative. Scholastic. Retrieved from: <https://s3.amazonaws.com/ekip-prod/activities/scholastic-three.pdf>
- Honey, R.E. (2013). Bitterroots and Bull Trout: Traditional Culture in Science Classrooms on the Flathead Indian Reservation. Doctoral Dissertation, Harvard Graduate School of Education.
- Mack, E., Augare, H., Different Cloud-Jones, L., David, D., Quiver Gaddie, H., Honey, R.E., Kawagley, A.O., ...Wippert, R. (2012). Effective Practices for Creating Transformative Informal Science Education Programs Grounded in Native Ways of Knowing. Cultural Studies of Science Education. 7, 49–70.
- Honey, R.E., Jessepe, J., Lamb, C., Charlo, A. (2022, October). The Repatriating Gathering: Envisioning the Future of Indian Education. Center for Indigenous Research, Curriculum, Language and Evaluation. Presented at NIEA 53rd Annual Convention & Trade Show, Oklahoma City, Oklahoma.
- Honey, R.E., Jessepe, J., Lamb, C., Charlo, A. (2021, October). Repatriating Educational Research: Determining, Defining, and Doing Research with Tribal Communities. Center for Indigenous Research, Curriculum, Language and Evaluation. Presented at NIEA 52nd Annual Convention & Trade Show, Omaha, Nebraska.
- Jetty, L. E., Bloom-Weltman, J., Honey, R. E., Fetto, M. & Long, L. (2020, April) Access to Certified Mathematics Teachers in Advanced Mathematics From the 2015–2016 Civil Rights Data Collection [Paper Session]. AERA Annual Meeting, San Francisco, CA, <http://tinyurl.com/sfu6y6x>
- Bloom-Weltman, J., Jetty, L.E., Honey, R.E. (2018, April). Access to Calculus: School Characteristics Associated with Minority Enrollment from the Civil Rights Data Collection. Paper presented by AEM Corporation at the AERA Annual Meeting, New York City, New York.
- Honey, R.E., Bloom-Weltman, J., Jetty, L. E. (2017, April). Access to Math: School Characteristics Associated with Minority Enrollment from the Civil Rights Data Collection. Paper presented by AEM Corporation at the AERA Annual Meeting, San Antonio, Texas.
- Honey, R.E., Doyle, S., and Smith, T. (2017, February) Honoring Tribal Legacies. Montana Indian Education for All Best Practices Conference, Helena, Montana.



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- Honey, R.E. & Brown, S. (2016, October). Honoring Tribal Legacies: An Epic Journey of Healing. Paper Presented at the NIEA Convention, Reno, Nevada.
- Honey, R.E. (April, 2013). Bitterroots and Bull Trout: Collateral Learning with Salish Students. In R. Honey (chair), Science Learning Within Cultures: What Does it Mean to 'Do Science' for Different Cultures? Structured Interactive Poster Session at the AERA 2013 Annual Meeting, San Francisco, California.
- Honey, R.E. (April, 2012). Honoring the Bitterroot: Traditional Knowledge, Science Education, and Intrinsic Motivation. Paper presented at AERA 2012 Annual Meeting, Vancouver, British Columbia.
- Honey, R.E., Augare, H. & Sachatello-Sawyer, B. (2011). Reciprocal Relationships: Effective Strategies for Integrating American Indian Culture into Science Education. Museums & Social Issues. 5,(1), 117-135.
- Honey, R.E. (2010). Tributaries of Knowledge: A Review of Culturally Relevant Science Education in North America. Qualifying Paper for Doctoral Candidacy, Harvard Graduate School of Education.
- Honey, R. (January 2023). Epistemological Pluralism and Indigenous Perspectives. Teaching Climate Change J-Term Course. Harvard Graduate School of Education, Cambridge, Massachusetts.
- Basch, R., Honey, R.E., Doyle, S., and Cajune, J. (July, 2016 and 2017). Honoring Tribal Legacies. Gilder Lehrman Institute of American History Teacher Seminar. Lewis and Clark: An American Epic. University of Montana, Missoula, Montana.
- Honey, R.E. (2013). Culturally Congruent Science Education: Can it Change How Students Learn and What Does it Look Like? Presentation at the Jack Kent Cooke Foundation. Lansdowne, Virginia.
- Honey, R.E. (February, 2013). Bitterroots and Bull Trout: Traditional Culture in Science Classrooms on the Flathead Indian Reservation. Presentation at the University of Oregon Department of Physics Departmental Winter 2013 Colloquium Series, Eugene, Oregon.
- Honey, R.E. (April & November, 2012). Culture and Science Education in Native Communities. Presentation at University of Great Falls Department of Education. Great Falls, Montana.



Kaily Bunch-Woodson (Subject Matter Expert)

Summary of Relevant Capabilities and Experience

Kailey has been a Technical Assistance Specialist with the IDEA Data Center and National Center on Improving Outcomes since 2023. Prior to her current work, Kailey was the State Personnel Development Grant (SPDG) Project Director at the Idaho Department of Education (IDE) where she successfully led and managed complex projects, engaged stakeholders, and provided technical assistance to local education agency and school staff. During her tenure at the IDE, she was also the State Systemic Improvement Plan (SSIP) evaluator, as well as the Data and Reporting Program Specialist. In these roles, Kailey was integral in the collection, reporting, analysis and use of program evaluation and IDEA Part B data. Additionally, Kailey acted as a Special Education Department representative on IDE's State Technical Assistance Team (STAT), the state leadership team responsible for overseeing all school improvement grants for comprehensive and targeted schools under Idaho's Consolidated State Plan. Her work drove decision making to improve the state's accountability systems as well as student outcomes.

Directly Related Experience

Technical Assistance Specialist, AEM Corporation

2023 – Present

Develops resources and provides technical assistance to state education agency staff related to IDEA Part B data.

- Develops tailored content and resources for the SSIP Data Quality Peer Group, supporting state education agency (SEA) professionals in utilizing SSIP data for collection, reporting, analysis, and decision-making
- Conducts training sessions and shares information during conferences utilizing effective adult learning principles
- Creates and updates specialized resources for SEA staff, guiding SEA personnel in their utilization
- Contributes expertise as a member of the Nonresponse Bias Analysis workgroup, supporting SEAs with Parent Involvement and Post-School Outcomes survey methods
- Plans and facilitates the Peer Learning Group (PLG), organizing virtual meetings to help SSIP staff in their work related to assessment data
- Provides intensive technical assistance to SEAs focusing on improving their SSIP initiatives related to assessments
- Reviews states' SPP/APRs and provides feedback to enhance SEA capacity in reporting special education data
- Builds and maintains relationships with SEA staff to foster collaboration and support

State Personnel Development Grant Coordinator, IDE

2020 – 2023

Managed software development and operational activities for multiple contracts providing grant monitoring and technical assistance needs for some of the largest Department programs.

- Developed SPDG application, resulting in grant award
- Directed Idaho's SPDG project, engaging stakeholders, managing contracts and budgets, establishing and maintaining relationships with partners, collaborating within teams, and delegating tasks
- Built and implemented the SPDG professional development (PD) system, forming implementation teams, providing comprehensive training and coaching to participants, establishing data and communication systems, and driving continuous improvement cycles



Kaily Bunch-Woodson (Subject Matter Expert)	
<ul style="list-style-type: none"> ▪ Delivered training and technical assistance (TA) to local education agency (LEA) special education directors, school administrators, teachers, and instructional coaches, focusing on data collection, analysis, and use ▪ Collaborated with national TA centers to continuously improve the PD system, facilitating improvements and best practices ▪ Communicated effectively through various channels, including presenting at state and national conferences, engaging with advisory committees, hosting webinars and meetings, writing technical documents, and creating engaging infographics, videos, digital modules, and data visualization dashboards and reports ▪ Compiled and reported all required information for submission of the SPDG annual performance report, ensuring accurate and timely submission ▪ Contributed to collaborative data analysis efforts, playing an instrumental role in enhancing the LEA Determinations system for improved data analysis and support 	
Special Education Program Evaluation Coordinator, IDE	2019 – 2020
<p>Built the program evaluation systems for two successful IDE PD projects, resulting in the ability to make data-driven decisions and continuously improve the training and technical assistance provided to education staff around the state.</p> <ul style="list-style-type: none"> ▪ Spearheaded the successful evaluation of Idaho's State Systemic Improvement Plan (SSIP) involving building the SSIP data system, collecting and analyzing data, utilizing data insights to identify improvement areas, effectively communicating findings, and reporting to the Office of Special Education Programs (OSEP) ▪ Managed the evaluation of Idaho Pyramid Model Collaborative project, dedicated to implementing Pyramid Model practices in early childhood environments ▪ Led a team in developing and refining the methodology to calculate LEA Determinations, conducting data analysis, and generating LEA Determination reports ▪ Cleaned and analyzed large data sets including statewide summative assessments, universal screening, and monthly progress monitoring ▪ Assisted in data analysis for reporting IDEA data for Idaho's State Performance Plan (SPP)/Annual Performance Report (APR) ▪ Created scripts to analyze Significant Disproportionality data annually and collaborated on a team to build the Significant Disproportionality support process and resources ▪ Played an integral role as a member of the interdepartmental State Technical Assistance Team, actively contributing to the development of Idaho's Consolidated State Plan 	
Special Education Data and Reporting Program Specialist, IDE	2017 – 2019
<p>Supported the Special Education Department and local education agencies with the collection, reporting, analysis, and use of IDEA Part B data.</p> <ul style="list-style-type: none"> ▪ Analyzed IDEA data and reported findings publicly and to OSEP on compliance and results indicators for students with disabilities ▪ Collaborated in the development of Idaho's special education Results-Driven Accountability Monitoring System ▪ Communicated with stakeholder groups including Idaho's Directors Advisory Committee (DAC) and Special Education Advisory Panel (SEAP) 	



Kaily Bunch-Woodson (Subject Matter Expert)	
<ul style="list-style-type: none"> Collaborated closely with developers to successfully build Idaho's Special Education Data Application, streamlining data management processes Created visually informative LEA data reports using Tableau, empowering LEA special education administrators to make informed decisions based on IDEA indicators and district performance Delivered training to special education staff statewide on the importance of high-quality data, best practices for data collection and reporting, and skills for data analysis and use 	
Public Knowledge, Various State Health & Human Services Initiatives	2015 – 2019
<p>Project Management Consultant supporting State Government Health and Human Services Agencies, State Offices of Information Technology, State Medicaid Agencies, and State Project Management Offices plan for and implement State Health Information Technology (HIT) system projects, programs, and complex strategic initiatives.</p> <ul style="list-style-type: none"> Project discovery including interviews, surveys, group facilitation, artifact analysis, best practices research IT project administration support through Design, Development & Implementation Phases, including development of business and functional requirements, QA/ QC, project status reporting risk & issue tracking and analysis Lead Go-Live analytics program; designed and presented State MMIS dashboard reporting on project health Lead enterprise information technology architecture State Self-Assessments for increased Federal financial participation Contributed to Executive-Level State Agency strategic planning deliverables such as Playbook for the procurement of modular MMIS Components; and establishing a Data Governance Program Roadmap to serve as a blueprint for key public-private initiative and partnership for sharing of health care data 	
Biostatistics and Epidemiology Lecturer, Catalonia International University	2016 – 2017
<p>Developed course curriculum, taught lecture and lab classes, and provided support to students in undergraduate-level biostatistics and epidemiology.</p> <ul style="list-style-type: none"> Taught statistics and epidemiology; including sampling methods, hypothesis testing, measures of frequency, association and impact, and study design Recorded tutorial videos and taught practical classes using SPSS on data management, conducting univariate and bivariate analyses, and interpreting and communicating findings Provided personalized student support and feedback and graded class assignments and final examination 	
Educational Background	
<ul style="list-style-type: none"> B.A., Anthropology, Willamette University Master of Public Health, Pompeu Fabra University, Barcelona, Spain 	
Professional Certifications	
<ul style="list-style-type: none"> Diploma de Espaniola como Lengua Extranjera (DELE), level B2 Teach English as a Foreign Language (TEFL) 	



Emily Rang (Subject Matter Expert)	
Summary of Relevant Capabilities and Experience	
<p>Emily has 15 years' experience in education data management and providing governance and technical assistance expertise across 3 contracts and two federal agencies.</p> <ul style="list-style-type: none"> ▪ Oversaw multiple varied TA plans, activities, content, tools and communications ▪ Provided best practices and materials for implementing data governance and data management to diverse organizations ▪ Passionate about leveraging CEDS to facilitate communication of complex technical information to non-technical people 	
Directly Related Experience	
Intensive Technical Assistance Lead, Center for the Integration of IDEA Data (CIID), AEM	2020 - Present
<ul style="list-style-type: none"> ▪ Managed all intensive TA SEA engagements and staff to improve the outcomes of students with disabilities. ▪ Devised and executed diverse TA plans involving transformational technology, people, and process changes at SEAs ▪ Collaborated with technology, communications, director, and products and tools to lead work in SEAs ▪ Presented and shared best practices for data management at national conferences 	
CEDS Coordinator, CEDS, AEM	2022 - 2023
<p>Convened a large workgroup of SEA technical and non-technical staff to collaborate on leveraging CEDS Connections to improve data quality of EDFacts data to ED.</p> <ul style="list-style-type: none"> ▪ Cultivated relationships with key ED staff to identify opportunities for CEDS to support or improve ED data quality and outcomes ▪ Designed and conducted TA activities to support audience-specific needs or uses for CEDS 	
Director of Data Governance, Center for the Improvement of Student Learning, Washington Office of Superintendent of Public Instruction	2017 - 2020
<p>Provided strategic leadership for Washington's K-12 education data improvement system.</p> <ul style="list-style-type: none"> ▪ Led the adoption and vision for CIID's Generate tool in Washington ▪ Coordinated the renewed effort for CEDS data mapping for K-12 data ▪ Led the adoption of a new public, open data repository with high-quality metadata for external users ▪ Led the development and implementation of agency data governance policies and procedures ▪ Directed the inter-agency K-12 Data Governance Group and internal Data Leadership and Data Management Committees ▪ Coordinated all legislative and press data requests and bill implementation ensuring ethical and valid data responses ▪ Led the Tableau Governance committee and provide strategic governance of new data visualizations ▪ Served as the agency EDFacts Coordinator, and owner of the agency's directory data, ensuring timely data quality 	



Emily Rang (Subject Matter Expert)	
Product Support Supervisor, Information Technology Services, Washington Office of Superintendent of Public Instructions	2012 - 2017
<p>Served as the supervisor of three IT support teams: Customer Support, Web and Business Intelligence, supporting the agency in interpreting and completing federal education data reporting.</p> <ul style="list-style-type: none"> ▪ Communicated complex technical information to non-technical peers and school personnel ▪ Facilitated diverse working groups including peers, leadership and school personnel with diverse backgrounds ▪ Influenced collaboration between IT architecture, business, external customers and IT developers ▪ Established relationships and processes to monitor and influence work across departments ▪ Acted on behalf of the director; represented the agency at state and national education conferences ▪ Managed multiple application development projects concurrently under conflicting timelines ▪ Evaluated and matured work intake and management processes 	
Customer Support Lead, Information Technology Services, Washington Office of Superintendent of Public Instructions	2010 - 2012
<p>Provided leadership to the IT Customer Support team in decisions and process development and use. Created, published, and delivered training materials and information to a variety of technical and non-technical customers, stakeholders, and the public.</p> <ul style="list-style-type: none"> ▪ Collaborated on various internal and external workgroups ▪ Performed incident and change maintenance requests as part of a team working towards fulfilling support desk goals ▪ Negotiated solutions with application developers and executed system testing plans ▪ Advocated for sound technical solutions; created quality business documentation 	
Data Analyst, Assessment and Student Information, Washington Office of Superintendent of Public Instructions	2008 - 2010
<p>Worked as part of the Assessment Analysts team managing and compiling large, confidential education data sets for state and federal reporting.</p> <ul style="list-style-type: none"> ▪ Developed communications and training for school personnel, parents, and stakeholders ▪ Validated and analyzed accountability data posted on Report Card website ▪ Reconciled large amounts of student-level data between multiple sources ▪ Designed and tested educational data collection and reporting online applications ▪ Presented at professional conferences 	
Educational Background	
<ul style="list-style-type: none"> ▪ B.S., Animal Science, California State University, Fresno 	
Professional Certifications	
<ul style="list-style-type: none"> ▪ WA State Certificate in PMP Business Analysis ▪ Certificate from CMMI Institute on the Data Management Maturity (DMM) Model 	

DR. BARBARA L. ADAMS

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Ph.D., Acoustics/Fisheries – Interdisciplinary Program
 University of Alaska Fairbanks (UAF), August 2002, Dissertation Title: “Modeling of the Fisheries Acoustics Problem”
 Advisor: Dr. Vikas Sonwalkar
 Master of Science, Mathematics
 Northern Arizona University, Flagstaff, Arizona, May 1993
 Bachelor of Arts, Mathematics, Statistics minor
 Messiah College, Grantham, Pennsylvania, May 1991

Recent Work***Adams Analytic Solutions*****Owner and Chief Analyst, May 2014 – present**

As an independent consultant I have developed and conducted education research on a statewide and district level, provided evaluation services for a university STEM grant as well as a nationwide NASA grant, subcontracted with other evaluators to provide quantitative data analysis, supported a cohort of PhD students in Guam in their continued work through the University of Alaska Fairbanks, and served as committee chair for a unique statewide legal settlement. Details on these contracts provided upon request.

I have facilitated, led, and managed various components of the Teacher Retention and Recruitment (TRR) work for the State of Alaska since 2020. During the first phase I facilitated a working group who collaboratively created a TRR Action Plan, for which I was the predominant writer and organizer. The roll out phase followed, where I created and disseminated presentations, emails, and flyers to share the TRR Action Plan. Phase 3 took on the form of management and implementation where I organized and led a team of facilitators who conducted regular small group meetings open to the public to generate deeper conversations on specific topics within the TRR Action Plan and recommend implementation steps. Concurrently, several contractors were tasked with producing reports on related topics to, in essence, compile options and details for practitioners. Within this current phase, I also produced [Alaska's TRR Playbook](#), a detailed document with strategies and support for implementing the TRR Action Plan recommendations organized by stakeholder groups. This was done by compiling, organizing, and synthesizing all of the work to date from the hundreds of stakeholders who participated throughout.

University of Alaska**Term Assistant Professor, UAF School of Education, Jan. 11, 2015 – May 13, 2017**

- Created and conducted mixed methods research processes classes
- Spearheaded three peer groups, one in education, one in social ecological systems, and one with a culture and policy theme for Guam students, totaling 30 PhD students

Interdisciplinary PhD Program Liaison, UAF Graduate School, Jan. 11, 2015 – May 13, 2017

- Guided potential applicants in completing required items
- Connected applicants with potential faculty to serve on their committees
- Supported the Graduate School on how to best serve students and answer their questions
- Supported the Interdisciplinary (INDS) Council, a set of six faculty working to strengthen the program, providing insights into student experiences
- Conducted seminars for potential applicants and for newly admitted INDS students to support them learning how to be successful as an interdisciplinary student and researcher

Research Lead, UA Alaska Statewide Mentor Project, Dec. 17, 2007 – Jun. 30, 2013

- Conducted quantitative and qualitative research through gathering, organizing, analyzing, and summarizing data
- Created and implemented research design and methodology for all research conducted on the mentor project
- Lead research team on large *Investments in Innovations* (i3) validation grant from US Dept of Ed
- Supervised other members of the research team
- Obtained and adhered to institutional research compliance
- Communicated effectively with mentors, project leaders, state education department reps, and other partners

Interim Director, UA Office of K-12 Outreach, Dec. 18, 2011 – Jun. 25, 2012

- Hired, trained, and supervised staff, office personnel for K-12 Outreach, Office of Academic Affairs
- Served as the lead authority of fiscal responsibility and compliance
- Oversaw, managed, and forecasted budgets for all K-12 Outreach programs. currently in excess of \$5M annually

Select Recent Publications

Adams, B. and Covey, J., (2020). Change Culture to Change Results, National School Boards Association/American School Board Journal website, April 1, 2020, <https://www.nsba.org/ASBJ/2020/April/change-culture-change-results>.

Lipka, J., Adams, B., Wong, M., Koester, D., and K. Francois. (2019). Symmetry and Measuring: Ways to Teach the Foundations of Mathematics Inspired by Yupiaq Elders. *Journal of Humanistic Mathematics*, 9(1), 107-157. DOI: 10.5642/jhummath.201901.07. Available at: <https://scholarship.claremont.edu/jhm/vol9/iss1/7>

Adams, B. L. and J. Covey (2018). *Research-based Educator Systems Support: Report for Year-Long Pilot Study, Jun. 30, 2018*. Internal report. Coalition for Education Equity.

Covey, J., Adams, B. L., & Wohlforth, C. (2015). *Educator Quality and Quantity* (Rep.). Anchorage, AK: CEEAC.

Adams, B. L. and A. Woods (2015) A Model for Recruiting and Retaining Teachers in Alaska's Rural K-12 Schools, *Peabody Journal of Education: Issues of Leadership, Policy, and Organizations*, 90(2), 250-262.

Kisker, E.E., J. Lipka, B. L. Adams, A. Rickard, D. Andrew-Ihrke, E.E. Yanez, and A. Millard (2012). The Potential of a Culturally Based Supplemental Mathematics Curriculum to Improve the Mathematics Performance of Alaska Native and Other Students. *Journal of Research in Mathematics Education*, 43(1), 75.

Adams, B.L. (2009) *Connecting Mentoring to Student Achievement in Alaska: Results and Policy Implications*, Online Submission, <http://www.eric.ed.gov/>, Eric #: ED510316.

Adams, B.L. and J. Lipka (2007). *Drying Salmon: Journeys into proportional and pre-algebraic thinking*. Part of the series Math in a Cultural Context: Lessons Learned from Yup'ik Eskimo Elders. Detselig Enterprises Ltd, Alberta, Canada.

Adams, B.L., Kagle, M., George, F. (2007). *Star navigation: Explorations into angles and measurement*. Part of the series Math in a Cultural Context: Lessons Learned from Yup'ik Eskimo Elders. Detselig Enterprises Ltd, Alberta, Canada.

Synergistic Activities

- Facilitation of several committees composed of diverse sets of stakeholders to gather and provide insights at a community or state level to support policy and practical changes.
- Creation of culturally relevant mathematics curriculum working with Yup'ik Eskimo elders for 7 years. Conducted teacher professional development and research studies around the curriculum development and usage. Worked with teams of multi-disciplinary professionals.
- Traveled around the state of Alaska and held Community Math Nights in over 30 villages.
- State and Regional Service: Board Member, Education Northwest Board of Directors, September 2009 – December 2016. Elected Secretary/Treasurer, 2012-13; Elected Vice Chairperson, 2013-14; Elected Chairperson, 2014-15; served as Ex-Officio Sep. 2015-Dec. 2016. Commissioner, Alaska Commission on Postsecondary Education, April 2020 – March 2024.
- Advisory Board Member, Nenana City Public School – School Board, April 2005 – October 2009; October 2018 – present. In addition to typical responsibilities, served on school district committee during negotiations with the teacher (NEA) and staff (NESSA) union representatives using Interest Based Bargaining methods, policy review committee, approval of correspondence school curriculum and course agreements, budget committee, and curriculum review committee.

Christina P. Linder

[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]@gmail.com**EDUCATION****Ph.D. Candidate – Adult Learning and Organizational Leadership (currently ABD)** University of Idaho, Boise, IDDissertation in progress: *Exploring the technical knowledge, attributes, and practices necessary for conducting meaningful teacher performance evaluations: A Delphi Study***M.S. Curriculum and Instructional Leadership 1992** National University, San Diego, CAThesis: *Cognitive Coaching: Authentic Professional Growth***B.A. English 1985** University of California, Los Angeles, CA**EMPLOYMENT EXPERIENCE****College of Southern Idaho, Twin Falls, ID****February 2019 - Present*****Director, Non Traditional Educator Preparation***

- Co-designed CSI's non-traditional educator preparation program with Charlotte Danielson as a result of a successful *Industry Partnership Grant* through the Idaho Workforce Development Council
- Primary responsibility for accreditation, program development, and continuous improvement
- Strategic planning and program expansion through District Grow Your Own partnerships
- Oversight and reporting related to \$1.3M Workforce Development Grant

Idaho State Board of Education, Boise, ID**January 2019 - Present*****Contractor - Special Projects***

- Created Idaho's first competency-based pathway to teaching
- Oversight of IdahoTeacher Evaluation Review
- Directed final Master Educator Premium selection
- Provide ongoing partnership and training in projects related to Idaho Teacher Pipeline and Educator Preparation Performance Measures

Idaho State Board of Education, Boise, ID**November 2016 - January 2019*****Educator Effectiveness Program Manager***

- Idaho Annual Teacher Evaluation Review: Designed processes according to statutory mandate; developed materials, assessor trainings, review requirements, and reports. Designed and conducted statewide professional development workshops on effective evaluation practices
- Development, implementation and oversight of Idaho's Master Educator Premium awards
- Development, implementation and oversight of Idaho Educator Preparation Performance Measures
- Development, implementation and oversight of Idaho Teacher Pipeline and resulting report
- Collaboration and joint project management with Idaho STEM Action Center

Idaho State University, Pocatello, ID**January 2014 - July 2016*****Associate Dean, College of Education***

- Primary responsibility for accreditation and educator preparation leadership
- Strategic planning and new program development
- Development and implementation of campus-wide faculty professional development opportunities
- Assistance with curriculum development and student petitions
- Participation in recruitment, retention and development activities
- Oversight of statewide grants and supervision of College of Education staff

Idaho State Department of Education, Boise, ID**January 2007 – December 2013*****Director of Certification, Professional Standards and Educator Quality******Responsibilities as Chief Certification Officer***

- Development and implementation of new/revised certification policy and requirements
- Licensure decisions
- Oversight of ethics investigations, final orders, and certificate conditions
- Supervision of program staff
- Technical assistance to school districts on state certification policies and initiatives

Responsibilities as Executive Administrator of Professional Standards Commission

- Implementation of state's strategic plan for educator quality
- Oversight of Title IIA federal grants and statewide project planning
- Development and implementation of teacher preparation approval processes and accountability
- Oversight of College of Education program approval and accreditation monitoring
- Promulgation of State Board Rule
- Liaison to Idaho Legislature and education stakeholders statewide
- Liaison to State Board of Education in higher education program approval and rulemaking

George Fox University, Boise Campus, ID

March 2002-January 2007

Executive Director – Boise Campus ~ August 2005-January 2007

- Community relations and marketing
- Oversight of strategic planning for Boise satellite campus
- Liaison to Main Campus (Newberg, OR)
- Oversight of budgets, graduate and undergraduate programs, and faculty evaluations

Director of Master of Arts in Teaching Program and Assistant Professor ~ March 2004-January 2007

- Primary teaching responsibilities implementing a cohort model
- Selection and recruitment of candidates
- Recruitment and supervision of faculty and university supervisors
- Supervision of clinical practice

Adjunct Professor of Bachelor of Arts, Organizational Leadership ~September 2002-June 2004

- Taught English and Professional Writing classes
- Primary teaching responsibilities implementing a cohort model (January 2003-June 2004)

Various Positions in Teaching and Educational Leadership

1987-2003

Executive Director, Child Development Center – Boise, Idaho

Federal Programs Director, Parma School District – Parma, Idaho

English Teacher – Boise, Idaho; Parma, Idaho; El Dorado Hills, California; Pasadena, California

PROFESSIONAL PRESENTATIONS

Linder, C. (2021, September). *Grow Your Own: Addressing Idaho's Teacher Shortage – Year One*. A multi-state presentation organized through the National Association for State Directors of Teacher Education and Certification (NASDTEC): Zoom

Linder, C. & Danielson, C. (2021, June). *Preparing Teachers to Stay: A New Competency-Based Pathway to Teaching*. A presentation given at the Annual Conference of the National Association for State Directors of Teacher Education and Certification (NASDTEC): Atlanta, GA.

Linder, C. (2015, March). *Implementation of the Framework for Teaching Beyond K-12*. A presentation given at the Regional Conference of the Danielson Group (DG): Portland OR.

Linder, C., Hedeon, D., Zikratch, D. (2015, March). *Evaluating and supporting teachers across the professional continuum*. A presentation given at the National Conference of the American Association of Colleges for Teacher Education (AACTE): Atlanta, GA.

Linder, C.P., Lys, D.G. & Whitcomb, J. (2013, February). *EdTPA: Policy after Practice-Addressing Sustainability in Non-legislated States*. A presentation given at the National Conference of the American Association of Colleges for Teacher Education (AACTE): Orlando, FL.

Kellerer, P., Linder, C. & Snow, J.G. (2013, February). *Cross-Institutional Partnerships for High Quality Teaching and Learning*. A presentation for the National Conference of the American Association of Colleges for Teacher Education (AACTE): Orlando, FL.

Linder, C. (2012, September). *Evaluation throughout the Career Continuum*. A presentation given at the Annual Conference of the National Comprehensive Center for Teacher Quality (NCCTQ): Washington, D.C.

Devine, B.D., Chamberlain, V.J. & Linder, C.P. (2012, June). *States Panel on Education Reform*. A presentation given at the Annual Conference of the National Association for State Directors of Teacher Education and Certification (NASDTEC): Baltimore, MD.

Linder, C.P. & Rice, K. (2011, June). *Creating an Endorsement for Online Teachers*. A presentation given at the Annual

Conference of the National Association for State Directors of Teacher Education and Certification (NASDTEC):
Sacramento, CA.

PROFESSIONAL SERVICE / LOCAL AND NATIONAL LEADERSHIP

Appointed Committee Member, *Professional Education Committee* (2021-Present)
National Association of State Directors of Teacher Education and Certification (NASDTEC)

Board Member, *Idaho Education News* (2020-2022)

Founding Board Member, *Danielson Group* (2018 - Present)

Appointed Committee Member, *Fiscal Stability/Effective Teachers and Leaders Committee* (2014)
Idaho State Board of Education/ Governor's Task Force for Improving Education

Idaho Team Lead, *Network for the Transformation of Educator Preparation* (August
2013-January 2014) **Current Team Member** (January 2014 – Present) Council of Chief State
School Officers (CCSSO)

Chair, *Interstate Agreement Committee* (2012- January 2014)
National Association of State Directors of Teacher Education and Certification (NASDTEC)

Idaho Team Lead, *States' Consortium on Educator Evaluation* (2011- January 2014)
Council of Chief State School Officers (CCSSO)

Appointed Committee Member, *Exploration of a National Code of Ethics for Educators* (2011-
January 2014) Research and Development, Educational Testing Service (ETS)

Invited Participant, *Creating Sustainable Teacher Career Pathways* (2011- 2013)
National Network of State Teachers of the Year (NNSTOY & Pearson)

Invited Participant, *Revisiting Teacher Evaluation: A Leadership Forum on Using Data to Improve Teaching and Learning* (2012) Carnegie Foundation for the Advancement of Teaching

Appointed Committee Member, *Multiple Performance Measures for Professional Licensure*
(2010-2012) Research and Development, Educational Testing Service (ETS)

Appointed Committee Member, *Teaching in the World of Virtual K-12 Learning* (2010-2011)
Research and Development, Educational Testing Service (ETS)

PROFESSIONAL REFERENCES - Upon Request

Jessica Newman, MA**EXPERTISE**

- Positive youth development programs and practices
- Out-of-school time and community-based programs
- Staff practices to foster youth skill-building
- Implementation readiness

EDUCATION

- BA, Psychology, George Mason University, 2007
- MA, Applied Developmental Psychology, George Mason University, 2009
- Doctoral Studies, Enrolled in PhD program at University of Illinois – Chicago, Educational Psychology

EXPERIENCE

More than 15 years of experience conducting applied research and evaluation with programs that support positive youth development, family engagement, and community development in schools and community-based settings.

Present Position

Senior Researcher, American Institutes for Research (AIR) (2012–Present)

Provides internal and external youth development- and out-of-school time-related content expertise for staff and organizations. Leads applied research and evaluation studies in partnership with national, state, and local leaders and creates resource materials and practical tools in collaboration with youth-serving organizations. Author of multiple handbook chapters, articles, blogs.

Selected Professional Experience

Principal Investigator, Development of a Model and Readiness Assessment of Family and Community Strengthening (Y-USA; 2022–Present)

Provides an overall vision and direction for implementation research and design to support YMCA of the USA's efforts to develop a model of family and community strengthening and stability in select YMCAs that serve immigrant and refugee communities. Leads the development of a reliable and validated readiness assessment for YMCAs that aim to implement family and

community strengthening and stability services.

Co-Principal Investigator, Million Coaches Challenge Implementation Study and Capacity Building Support (Susan Crown Exchange; 2021–Present)

Guides the overall conception, design, and implementation of a multiyear mixed-methods implementation study of the Million Coaches Challenge, a partnership across 11 national youth-serving sports and coaching organizations to train one million coaches in youth development and social and emotional learning practices by 2025. Provides ongoing evaluation and measurement-related capacity-building and technical assistance for the 11 partner organizations.

Project Director, Study of Evidence-Based Design Principle Implementation, Adaptation, and Conditions in Texas Voluntary Summer Learning Programs (2020–Present)

Oversees the multiyear, mixed-method study of a statewide voluntary summer learning initiative through the Texas Education Agency implementation of the Additional Days School Year program, through the Texas House Bill 3. This project focuses on exploring whether, how, why, and under what conditions the ADSY summer programs implement evidence-based design principles. Leads day-to-day management of all project operations including task design and execution, analysis planning, data collection, communication with stakeholders, and resource development, and capacity-building initiatives.

Project Director, Ready to Implement (2020-Present)

With the support of the Wallace Foundation and the Susan Crown Exchange, AIR is developing the [Ready to Implement Toolkit](#) for out-of-school time (OST) practitioners to (1) measure their readiness to implement new initiatives and (2) access resources and professional learning that are aligned with their level of readiness. In its first iteration, the Ready to Implement Toolkit is focused on readiness for social and emotional learning in OST. It is our goal to support the OST field—that is, organizations and individuals—in building readiness and undertaking effective change management in preparation for and during implementation.

Principal Investigator, Applied Research and Evaluation Projects with the New York City Department of Youth and Community Development (DYCD; 2021-2022)

Leads the design and implementation of three applied research and evaluation initiatives focused on youth, family, and community development: (1) programs supporting youth aged 14-24; (2) programs supporting youth with disabilities; and (3) internal evaluation support for DYCD's Evaluation and Monitoring System.

Survey Task Lead, Summative Evaluation of the Gates Foundation Networks for School Improvement (2020-2021)

Provides oversight and direction as part of AIR's role in the summative evaluation of the NSI. Focused on understanding, gathering, and analyzing district school climate data and implementation of a principal survey for schools in select districts that are part of the NSI.

Project Lead, Ready to Assess (2014-2020)

The [Stop, Think, Act: Ready to Assess toolkit](#) was designed to highlight the importance of implementation readiness and the conditions that foster social and emotional learning and development and collate available assessments of learning conditions in and out of school and social and emotional competency assessments.

Senior Advisor, Chicago Public Schools Competency-Based Education and Social and Emotional Learning Integration Evaluation Support (2020)

Provides oversight and direction of AIR's efforts to develop a CBE-SEL integration evaluation tool in collaboration with Chicago Public Schools. Oversee the development of the evaluation plan, measures, and professional learning opportunities that will enable educators to use the tool, gather data, and make data-informed decisions.

Quality Assurance Advisor, Retrospective Inquiry of the S. D. Bechtel, Jr. Foundation's Grantee's System of Supports (2019-2020)

Provides oversight of all project tools, methods, and final deliverables related to AIR's work with the S.D. Bechtel Jr. Foundation to conduct a retrospective that describes the system of supports provided to grantees and, in turn, grantees' experiences within the broader initiative. AIR will gather information formally (i.e., surveys and document reviews) and informally (e.g., semi-structured conversations) from key stakeholders to develop a description of system of supports and related stories of grantees' experiences that will be reliable and authentic and will contribute to understanding of how to design and provide supports for grantees.

Project Director, Evaluation of School's Out New York City, New York City Department of Youth and Community Development, AIR (2014–2020)

Oversees the multiyear, mixed-method evaluation of a citywide afterschool initiative for middle school youth. This project focuses on exploring in-depth program implementation and

conducting a rigorous analysis of youth development outcomes. Leads day-to-day management of all project operations including task design and execution, communication with DYCD, and resource development and capacity-building initiatives.

Co-Facilitator, Social and Emotional Learning Professional Development for Texas Region One Education Service Center Division of Instructional Leadership, School Improvement, and College Readiness Support Division (2019)

Designed and co-facilitated two planning sessions to better understand Region One needs and goals related to social and emotional development. Utilized information from participatory planning sessions to design and co-facilitate a full-day professional learning session on social and emotional learning (SEL) for leadership across the Region One Division of Instructional Leadership, School Improvement, and College Readiness Support divisions and teams. The event focused on establishing a shared definition for SEL, alignment of SEL with each team's respective work/content areas, and the critical components of readiness and conditions for learning that are necessary and underpin effective SEL.

Visiting Scholar, Developing a Model to Facilitate the Successful Implementation of SEL Programs, AIR (2019)

Provides consultation in collaboration with ACT, Inc. and faculty at the University of Iowa's College of Education to support the development of a model for effective SEL skill development for students, educators, administrators, and schools to improve student learning and preparation for postsecondary education, careers, and life through a comprehensive multi-pronged approach to measuring and improving SEL school readiness.

Principal Investigator, Aurora Afterschool Expansion, AIR (2019–2020)

Designed and leads a consultative project with Aurora Public Schools (APS; Colorado) to leverage mill levy funds intended to develop/expand the existing afterschool programming for students in grades K-5. Project methods and activities include a field scan (literature scan, interviews with leaders of citywide afterschool systems), landscape scan (using extant and primary data on APS schools and afterschool providers), and ongoing meetings with a newly formed (and co-led) advisory group. AIR will develop a set of recommendations for a two-phase system expansion while providing ongoing data collection and capacity-building supports during the launch.

Project Lead, SEL to the CORE, AIR (2018–2019)

Supported by the National AfterSchool Association (NAA), AIR developed [SEL to the Core: Building from Foundational Youth Development to Support Social and Emotional Learning](#) as a support for afterschool professionals and leaders. The guide is designed as a supplement to the NAA Core Knowledge and Competencies for Afterschool and Youth Development Professionals (NAA CKCs), which present the knowledge, skills, and dispositions needed by out-of-school time (OST) professionals to provide high-quality youth development programming to support the learning and development of children and youth (NAA, 2011). The guide was created following a review of practice-focused SEL resources and guidance and articulates eight field-tested, research and evidence-based practices for promoting SEL, with the most foundational organizational practices followed by programmatic practices. The section for each practice identifies who should be involved and is supported by the rationale, the aligned NAA CKCs content areas, and a sample of practical and actionable strategies. The who, why, and how are all included.

Project Director, Evaluation of Playworks Pro, AIR (2018–2020)

Leads a mixed-method evaluation of Playworks' professional development service model, *Playworks Pro*, in Western NY and Eastern MI. Funded by the Ralph C. Wilson, Jr. Foundation, the evaluation is designed to help Playworks better understand whether and how professional development supports adults to value play and support for Playworks while also preparing them to implement Playworks at their school. The evaluation will also help Playworks to understand whether and how participation in Playworks Pro supports the implementation of Playworks at schools/sites, leading to safe and healthy play.

Project Director, Playworks Pro Early Childhood Consultation, AIR (2018–2019)

Leads a collaborative and consultative project with Playworks to better understand how Playworks trainers have adapted the professional service model for use with early childhood educators, and whether these adaptations align with known best practices in the field of early childhood education.

Senior Advisor/Quality Assurance Advisor, Kauffman Foundation Systematic Measurement Plan Development for Afterschool Programs (2018–2019)

Supports AIR's collaborative efforts with the Kauffman Foundation to develop a systematic measurement plan to better understand implementation and outcomes along with social and emotional learning efforts from their funded afterschool program grantees.

Quality Assurance Advisor, Wallace Foundation PSELI Data Scan, AIR (2018–2019)

Supports AIR's collaborative efforts with the Forum for Youth Investment, RAND Corporation, and the Wallace Foundation to better understand the capacity and readiness for SEL in the out-of-school time program and intermediary organizations participating in the Foundation's six-year *Partnerships for Social and Emotional Learning* initiative.

Project Director, Higher Achievement SEL Material Development, AIR (2018)

Leads a mixed-method capacity-building effort designed to understand current practices that Higher Achievement centers employ to support youth social and emotional development to inform the development of a suite of training materials around social and emotional learning practices for staff and volunteer mentors. Develops observation protocols and staff interview measures to collect data, and advises staff on development of training materials and tools.

Project Director, National AfterSchool Association *Afterschool Tech Toolkit* Implementation and Output Evaluation, AIR (2017–2019)

With funding from Google, AIR is collaborating with the National AfterSchool Association, Development Without Limits, Serendipity Media, and a national advisory board to better understand digital learning in out-of-school time. Leads the data collection, analysis, and reporting from survey measures built in to the *Afterschool Tech Toolkit*. The measures are designed to better understand *Toolkit* user experience and subsequent implementation of digital learning practices and programs.

Principal Investigator, Study of Playworks Adult Behavior Change, AIR (2017–2018)

Oversees a mixed-method exploratory research study of an approach designed to understand the experience of Playworks staff, particularly those involved in the TeamUp model, designed to facilitate recess and playtime. Funded by Playworks, AIR is working to understand the different

adult characteristics associated with successful implementation of the TeamUp approach. Surveys and qualitative focus groups will be administered with staff at a representative sample of Playworks sites. Responsibilities include providing direction of all project activities, leading communication with external clients, and ensuring deliverables are of high quality.

Project Director, Alliance for a Healthier Generation + Playworks Pilot Evaluation, AIR (2017–2018)

Responsible for all day-to-day project operations and oversight of a mixed-method evaluation of the Alliance for a Healthier Generation's Social and Emotional Health (SEH) Community pilot. Manages research activities, which include creating a best practices toolkit for practitioner interviewers, oversight of all analysis plans and coding framework, managing a team of qualitative and quantitative analysts, oversight of all analyses and summarizing findings in a series of memos for the client.

Project Director, Alliance for a Healthier Generation Partnership Evaluation Logic Model Development, AIR (2017–2018)

Provides research support to the Alliance for a Healthier Generation around partnership evaluation. Currently developing a logic model and aligned indicators to better understand Alliance for a Healthier Generation's strategic partnerships.

Project Director, Alliance for a Healthier Generation Integrating SEL and HEPA, AIR (2017–2018)

Provides research support and subject matter expertise to the Alliance for a Healthier Generation and other key stakeholders around integration of social and emotional (SEL) learning and healthy eating and physical activity (HEPA). This work will inform the development of subsequent resources including the HEPA Standards and other materials that may be used by the HOST Coalition.

Project Director, Research and Evaluation Support to NatureBridge, AIR (2017–2018)

AIR is working collaboratively with NatureBridge team to develop a comprehensive theory of change and aligned dual-purpose evaluation framework to be implemented across all campuses. This work builds from previous efforts with NatureBridge to align their program framework with social and emotional learning. The project included a participatory mapping approach to elevate key social and emotional competencies within the NatureBridge model, a review of supporting framework materials, and a brief on evaluation considerations.

Project Director, Oregon Department of Education (ODE) 21st Century Community Learning Centers (CCLC) Continuous Quality Improvement Process, AIR (2016–2018)

Managed the tasks and deliverables for a three-year project with the purpose of developing and implementing a continuous quality improvement process (CQIP) for Oregon's 21st CCLC grantees. This includes working with the ODE's 21st CCLC Advisory Group to select and develop tools, as well as develop and implement a process for implementing the CQIP throughout the state. Lead the convening a CQIP Cohort of grantees to conduct site visits and interviews with site coordinators to gather information about program implementation.

Project Manager, Evaluation Roadmap for the Achievement Gap Programs, YMCA of the USA, AIR (2014–2015)

In this short term and collaborative project, AIR and their YMCA partners developed a dual-purpose evaluation road map, including measures, methods, and relevant connections for internal use at the YMCA of the USA. Included the design of the roadmap using participatory processes and project oversight.

Project Manager, Measurement Framework for Afterschool Systems, Every Hour Counts, AIR (2013–2014)

Worked with Every Hour Counts partner organizations to refine and revise their measurement framework, which included measures, methods, and connection at the system, program, and youth levels. Responsibilities included the design of the framework using participatory processes and project coordination.

Contributing Analyst, Lessons from the Field Guide, U.S. Department of Education, AIR (2013–2014)

Analyzed the data findings in multiple content areas and summarized findings for lead authors tasked with the development of content-specific guides for afterschool professionals.

Project Director, Research Support, and Contributing Author, *Beyond the Bell*, AIR (2012–Present)

Leads all resource development, marketing, and communications for AIR's comprehensive resource, *Beyond the Bell*. Oversees the development of new products, field-friendly briefs, and new tools. Responsible for internal coordination and external marketing and sales. Contributing author to the 4th edition of the *Toolkit* and lead developer of the online resource, *Beyond the Bell – Live!*

Research Support, Oregon Statewide Evaluation and Needs Assessment of 21st Century Community Learning Centers, AIR (2011–2014)

This project has included a rigorous youth outcomes study and needs assessment geared toward understanding the opportunities and barriers to implementing systemic quality improvement practices for afterschool programs in Oregon. Responsibilities included the execution of the 21st Century Community Learning Centers (21st CCLC) evaluation, the design of the needs assessment, and project oversight.

Task Lead, Afterschool Evaluation and Technical Assistance, Say Yes to Education Syracuse, AIR (2011–2014)

This multiyear project started as an evaluation of program quality and grew to include targeted technical assistance and professional development for program leadership.

Consultant, CASEL Guide and State Scan Projects, Collaborative for Academic, Social, and Emotional Learning, Collaborative for Academic, Social, and Emotional Learning (CASEL) (2012)

Provided ongoing support in response to inquiries following the release of the *2013 CASEL Guide: Effective Social and Emotional Learning (SEL) Programs, Preschool and Elementary Edition*. Assisted with revising the coding guide used to rate SEL programs and developed databases to be used to collect, analyze, and monitor program data. Developed a state scoring system for the CASEL State Scan Project, piloted the new approach, and analyzed data to understand the effectiveness of the system. Provided recommendations for the research team regarding future efforts in reviewing SEL programs and state learning standards. Co-authored a chapter on SEL standards that is included in the *Handbook of Social and Emotional Learning*.

Senior Research Specialist, University of Illinois–Chicago (2010–2012)

Served as project coordinator and lead research specialist on multiple projects including the *CASEL Guide: Effective Social and Emotional Learning (SEL) Programs*, a review of evidence-based SEL programs, and the CASEL State Scan project, a review of state learning standards that support social and emotional development in prekindergarten–Grade 12 education across the United States. Developed project-specific coding systems; created and maintained databases; collected and analyzed data; conducted interviews and surveys; and assisted with the creation of reports, presentations, and user guides to disseminate findings to a variety of audiences. Assisted in the development of tools for understanding the Common Core State Standards and created crosswalk tools and presentations linking the Common Core and social and emotional learning areas. Provided ongoing support to all research working groups, program provider and research advisory groups, and district consultant meetings including providing professional development, facilitating discussion groups, assisting with user guides and reports, implementing surveys, and analyzing responses.

Research Coordinator, Rush NeuroBehavioral Center (2009–2010)

Coordinated ongoing research projects to advance the efforts of an organization engaged in research to better understand assessment of social-emotional learning competencies, treatment of social-emotional learning challenges, and the mechanisms that underlie these skills. Led the Preschool Assessment Project (building on previous NICHD-funded work in the Child Development Lab at George Mason University) and the Friendship Clinic Assessment Project. Prepared and maintained human subjects review protocol; recruited research participants; created and monitored communication with subjects and participant schools; conducted site visits with local Chicago and suburban Illinois schools; collected data using performance assessments, interviews, and surveys; entered, managed, and evaluated research data and trained and certified other researchers in these measures.

Research Assistant, Child Development Lab, George Mason University (2006–2009)

Worked in collaboration with Dr. Susanne Denham (professor of psychology and chair of the Applied Developmental Psychology division in the Department of Psychology) on the Assessing Social-Emotional Skills for School Readiness (ASESSR) project, a multi-year NICHD-funded project with the goals of (1) understanding early childhood social and emotional development over time and (2) creating and refining assessment tools for researchers and educators to use when measuring social and emotional development. Collected data using multiple assessment methodologies including performance assessment, observation technique, interviews, and surveys and trained others in these measures. Assisted with institutional review board application and ongoing maintenance, entered data and maintained database quality, participated in ongoing research meetings and literature reviews. Trained and certified in the Classroom Assessment Scoring System (CLASS) for preschool-age students.

Employment History

2018–Present	Senior Researcher, AIR
2015–2018	Researcher, AIR
2012–2015	Research Associate, AIR
2010–2012	Senior Research Specialist, University of Illinois-Chicago
2012	Consultant, CASEL Guide and State Scan Projects, Collaborative for

Academic, Social, and Emotional Learning
2009–2010 Research Coordinator, Rush NeuroBehavioral Center
2006–2009 Research Assistant, George Mason University

Awards and Honors

Most Influential in Research & Evaluation, National AfterSchool Association, 2018

Selected Publications

- Brown, L., **Newman**, J., Baumann, E., Schwartzhaupt, R., & Liu, F. (2018). *Understanding the recess team: What drives school staff in implementing Playworks?* Chicago, IL: American Institutes for Research.
- Dusenbury, L.A., **Newman**, J.Z., Weissberg, R.P., Goren, P., Domitrovich, C.E., & Mart, A.K. (2015). The case for preschool through high school state learning standards for SEL. In J.A. Durlak, C.E. Domitrovich, R.P. Weissberg, & T.P. Gullotta (Eds.), *Handbook of social and emotional learning research and practice* (532-548). New York: The Guilford Press.
- Dusenbury, L., **Zadrazil**, J. A., Mart, A.K., & Weissberg, R.P. (2011). *State learning standards to advance social and emotional learning*. Chicago, IL: Collaborative for Academic, Social, and Emotional Learning (CASEL).
- Lentz, A., & **Newman**, J.Z. (in press). The practitioner's challenge: Readiness for change. In M. Arnold & T. Ferrari (Eds.), *Positive Youth Development: Integrating Research and Practice*.
- McElvain, C. K., Moroney, D. A., Devaney, E. D., Singer, J. S., & **Newman**, J. Z. (2014). *Beyond the Bell: A toolkit for creating effective afterschool and expanded learning programs* (4th ed.). Washington, DC: American Institutes for Research.
- Moroney, D.A., & **Newman**, J.Z. (2020). *Recognizing the Role of Afterschool and Summer Programs and Systems in Reopening and Rebuilding*. Chicago, IL: American Institutes for Research. Retrieved from <https://www.air.org/resource/brief/recognizing-role-afterschool-and-summer-programs-and-systems-reopening-and>.
- Moroney, D.A., **Newman**, J.Z., & Osher, D. (2018). Out-of-school time programs. In D. Osher, D.A. Moroney, & S. Williamson (Eds.), *Creating safe, equitable, engaging schools: A comprehensive, evidence-based approach to supporting students* (121-132). Cambridge, Mass: Harvard Education Press.
- Moroney, D.A., Devaney, E., Vinson, M., & **Newman**, J.Z. (2015). *School's Out New York City Initiative Year 1 Report*. Chicago, IL: American Institutes for Research.
- Moroney, D.A., **Newman**, J.Z., Brown, L., Swanlund, A., & Devaney, E. (2016). *School's Out New York City Initiative Year 2 Report*. Chicago, IL: American Institutes for Research.
- Naftzger, N., & **Newman**, J.Z. (2021). *Harnessing the Power of Afterschool and Summer Programs to Support Recovery and Reengagement*. Washington, DC: American Institutes

for Research. Retrieved from <https://www.air.org/resource/brief/harnessing-power-afterschool-and-summer-programs-support-recovery-and-reengagement>.

Newman, J.Z., Lentz, A., Cook, B., Osher, D., & Wandersman, A. (in press). Are you ready for SEL? Connecting research, theory, and practice. In J.A. Durlak, C.E. Domitrovich, & J. L. Mahoney (Eds.), *Handbook of social and emotional learning research and practice*, 2nd edition. New York: The Guilford Press.

Newman, J.Z., & Moroney, D. A. (in press). Social and emotional learning in out-of-school time and community. In J.A. Durlak, C.E. Domitrovich, & J. L. Mahoney (Eds.), *Handbook of social and emotional learning research and practice*, 2nd edition. New York: The Guilford Press.

Newman, J.Z., Osher, D., Moroney, D., & Neiman, S. (2022). Thriving Matters: Policies and Assessment That Foster Equity and Thriving. In S. Jones, N. Lesaux, & S. Barnes (Eds.), *Measuring Noncognitive Skills in School Settings: Assessments of Executive Function and Social-Emotional Competencies* (304-329). New York: Guilford Press.

Newman, J.Z., & Singer, J. (2021). *Recognizing the Role of Research and Evidence in Out-of-School Time*. Chicago, IL: American Institutes for Research. Retrieved from <https://www.air.org/project/recognizing-role-research-and-evidence-out-school-time>.

Newman, J.Z. (2020). *Resources to Go Beyond the Basics and Support the Whole Child*. Chicago, IL: American Institutes for Research. Retrieved from <https://www.air.org/resource/field/resources-go-beyond-basics-and-support-whole-child>.

Newman, J.Z. (2020). Supporting the out-of-school time workforce in fostering intentional social and emotional learning. *Journal of Youth Development*.

Newman, J.Z., Brown, L., Miller, F., Swanlund, A., Neiman, S., McMillan, A., & Moroney, D.A. (2017). *School's Out New York City Initiative Year 3 Report*. Chicago, IL: American Institutes for Research.

Newman, J.Z., & Dusenbury, L.A. (2016). Social and emotional learning (SEL): A framework for academic, social, and emotional success. In K. Bosworth (Ed.), *Prevention science in school settings: complex relationships and processes*. New York: Springer.

Newman, J.Z., Dymnicki, A., Fergus, E., Weissberg, R.P., & Osher, D. (2018). Social and emotional learning matters. In D. Osher, D.A. Moroney, & S. Williamson (Eds.), *Creating safe, equitable, engaging schools: A comprehensive, evidence-based approach to supporting students* (213-222). Cambridge, Mass: Harvard Education Press.

Newman, J.Z., Garcia, B., Swanlund, A., Miller, F., & Moroney, D.A. (2018). *School's Out New York City Initiative Year 4 Report*. Chicago, IL: American Institutes for Research.

Newman, J.Z., Garcia, B., & Yu, L. (2017). *Oregon 21st Century Community Learning Centers Program: Year 1 CQIP Report*. Chicago, IL: American Institutes for Research.

- Newman, J.Z., & Moroney, D.A.** (2019). Reading between the lines of social and emotional learning. *Young Adult Library Services*, 17(2), 16-21.
- Newman, J.Z., & Moroney, D.A.** (2014). *Oregon 21st Century Community Learning Center (CCLC) Program: Findings and Recommendations From the 2013–14 Needs Assessment*. Chicago, IL: American Institutes for Research.
- Newman, J.Z., Singer, J., & Foley, K.** (2013). *Tenaris Blytheville Academic Excellence Afterschool Program: Year Three Evaluation Report*. Chicago, IL: American Institutes for Research.
- Newman, J.Z., & Singer, J.** (2015). *Oregon 21st Century Community Learning Centers Program: Findings and Recommendations From the 2014–15 Needs Assessment Project Pilot*. Chicago, IL: American Institutes for Research.
- Singer, J., Newman, J., Moroney, D.** (2017). Building quality in out-of-school time. In H. Malone & T. Donahue (Eds.), *The Growing Out-of-School Time Field: Past, Present, and Future* (195-210). Information Age Publishing.

Selected Presentations

- Brown, L., Claassen, J., Newman, J.Z., & Steele, J.** (2018). *Understanding the Recess Team: What Drives School Staff in Implementing Playworks as a Strategy to Improve Character?* Poster presented at the 2018 Society for Research in Child Development special topic meeting *Promoting Character Development Among Diverse Children and Adolescents: The Roles of Families, Schools, and Out-of-School Time Youth Development Programs*, Philadelphia, PA.
- Cason, K., & Newman, J.Z.** (2018). *Promoting the Positive Through Youth Leadership*. Co-presenter. National AfterSchool Association Convention 2018, Atlanta, GA.
- Claassen, J., & Newman, J.Z.** (2018). *The Power of the Practitioner: Learning What Drives School Staff in Implementing Playworks as a Strategy to Improve Outcomes*. Paper presented at the annual meeting of the American Evaluation Association, Cleveland, OH.
- Dymnicki, A., Newman, J.Z., & Brown, M.** (2019). *Exploring strength-based research to understand in-school and out-of-school programs*. Roundtable co-presenter. Midwestern Psychological Association Annual Meeting, Chicago: IL.
- López, F.A., & Newman, J.Z.** (2016). *Making Meaning: Understanding and Using Your Program Data to Improve Practice*. Co-presenter. Ongoing series for School's Out New York City (SONYC) program directors and multi-site supervisors, New York, NY.
- López, F.A., & Newman, J.Z.** (2014). *Setting the Standard: Integrating Core Academic Standards into Expanded Learning Activities*. Co-presenter. Coalition for Community Schools, Cincinnati, OH.
- López, F.A., & Newman, J.Z.** (2013). *Youth Development in Context: Youth Centered Engagement Practices in OST*. Co-presenter. Beyond School Hours Conference XVI, Jacksonville, FL.

- Gilbert, D., Pressley, H., & **Newman, J.** (2018). *Connecting the Dots: Developing Social, Emotional, and Employability Skills in Out-of-School Time Settings*. Co-presenter. 2018 Social and Emotional Learning Conference, Harrisburg, PA.
- Jackson, J., & **Newman, J.Z.** (2018). *Principal Perspective: Using School Leadership Priorities for Collaboration*. Co-presenter. PASE@PACE Conference, New York, NY.
- Jackson, J., & **Newman, J.Z.** (2017). *Promoting Youth Development: The NYC Experience*. Co-presenter, Beyond School Hours XX, Atlanta, GA.
- Lentz, A., & **Newman, J.Z.** (2023). *Change is inevitable. Are you ready?* Co-presenter. National AfterSchool Association Convention 2023, Orlando, FL.
- Moroney, D.A., Singer, J.S., **Newman, J.Z.** (2016) *The Power of SEL*. Co-conveners and lead speaker at the National AfterSchool Association Convention 2016, Orlando, FL.
- Moroney, D.A., & **Newman, J.Z.** (2015). *Supporting Social and Emotional Development Through Quality Afterschool Programs*. Co- presenter. Afterschool Works NY, Rochester, NY.
- Newman, J.Z.** (2023). *Change is inevitable. Are you ready?* Lead presenter. Forum for Youth Investment Annual Meeting, Detroit, MI.
- Newman, J.Z., & Lentz, A.** (2023). *Change is inevitable. Are you ready?* Co-presenter. Best Outof-School Time (BOOST) Conference 2023, Palm Springs, CA.
- Newman, J.Z.** (2022). *Providing high quality, evidence-based OST programs for students most at risk from the impact of COVID-19*. Lead facilitator. Presentation prepared for the Wisconsin Afterschool Network, virtual.
- Newman, J.Z., & Lentz, A.** (2022). *Ready, set, go! Measuring and building implementation readiness*. Co-presenter. National Afterschool Association Convention 2022, Las Vegas, NV.
- Newman, J.Z.** (2019). Exploring the relationship between quality practice and youth leadership outcomes in NYC. In D. Darling (Chair), *Digging deeper: Using Mixed-Methods Research to Assess Promising Practices in Out-of-School Time*. Paper presented at the annual meeting of the American Evaluation Association, Toronto, ON.
- Newman, J.Z.** (2018). *SEL Beyond the Bell: Integrating SEL Practices in Out-of-School Settings*. Invited speaker for *Beyond the Bell* topical webinar series, online.
- Newman, J.Z.** (2018). *Defining Social and Emotional Learning (SEL)*. Invited speaker for the Blue Sky Funders Forum, online meeting.
- Newman, J.Z.** (2018). *The Wonder Years: How the College Pipeline Starts with Middle School Social and Emotional Learning*. Invited speaker for Higher Achievement's annual board dinner, Washington, DC.
- Newman, J.Z.** (2018). *Dream > Design > Deliver: Intentional Program Planning for WI 21st CCLC Programs*. Invited pre-conference lead. Wisconsin 21st Century Community Learning Center Fall Conference 2018, Wisconsin Dells, WI.

- Newman, J.Z.** (2018). *Youth Engagement: Voice, Choice, and Leadership*. Invited lunch keynote speaker. Wisconsin 21st Century Community Learning Center Fall Conference 2018. Wisconsin Dells, WI.
- Newman, J.Z.** (2018). *Going Above and Beyond (the Bell) with Intentional Opportunities for youth Development: Voice, Choice, and Leadership*. Invited session facilitator. Wisconsin 21st Century Community Learning Center Fall Conference 2018, Wisconsin Dells, WI.
- Newman, J.Z.** (2018). *SEL Beyond the Bell: Integrating SEL Practices in Out-of-School Settings*. Lead presenter. Living SEL Conference 2018, Downers Grove, IL.
- Newman, J.Z., Bat-Chava, Y., Johns, R., & Young, J.** (2017). *Making Meaning: How Citywide Initiatives Use Data to Inform Practice*. Moderator. National AfterSchool Association Convention 2017, Dallas, TX.
- Newman, J.Z.** (2015). *Supporting Social and Emotional Development Through Quality Afterschool Programs*. Lead presenter. Beyond the Bell Institute, Milwaukee, WI.
- Newman, J.Z.** (2014). *College and Career Readiness in Afterschool*. Lead presenter. Illinois AfterSchool Network Spring Conference, Springfield, IL.

DARRIS R. MEANS, Ph.D.

Executive Director for Rural and Community-Based Education

Associate Professor

University of Pittsburgh, School of Education

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EDUCATION

2014 Ph.D., Educational Research and Policy Analysis
Concentration: Higher Education
North Carolina State University, Raleigh, NC

2007 M.Ed., Counselor Education
Concentration: Student Affairs
Clemson University, Clemson, SC

2005 B.A., Political Science and Sociology
Elon University, Elon, NC

ACADEMIC POSITIONS

University of Pittsburgh, Pittsburgh, PA**School of Education***Department of Educational Foundations, Organizations, and Policy**Associate Professor (with tenure)*, August 2020-present*Executive Director for Rural and Community-Based Education*, July 2023-present*Dean's Faculty Scholar in Equity, Justice, and Rural Education*, August 2021-June 2023*Additional Faculty Affiliations:* Adjunct Associate Professor at University of Georgia, Affiliate for North Carolina State University's Belk Center for Community College Leadership and Research, Faculty Affiliate in University of South Carolina's Center for the Education and Equity of African American Students, Diversity Scholars Network at the National Center for Institutional Diversity at the University of Michigan**University of Georgia, Athens, GA****Mary Frances Early College of Education***Department of Counseling and Human Development**Associate Professor (with tenure)*, August 2019-August 2020*Assistant Professor*, August 2014-July 2019*Ph.D. Program Coordinator*, College Student Affairs, August 2019-August 2020*Faculty Affiliations at University of Georgia:* Interdisciplinary Qualitative Studies Certificate Program, Owens Institute for Behavioral Research**Additional Higher Education Professional Experience****Elon University, Elon, NC***Elon Academy Associate Director*, June 2011-July 2014*Elon Academy Assistant Director*, February 2007-May 2011

Served on program team to create and implement a year-round, college access and success program for high school and college students with a financial need and/or no family history of

college. Advised over 120 students on the college admissions process and 100% were admitted to at least one college. Designed and coordinated programs and services to increase college persistence of Academy college students: 95% college persistence rate. Supervised 2 professional staff members and 13 undergraduate students. Partnered with public school system to recruit, select, and support approximately 75 high school students in the Academy.

GRANTS AND FELLOWSHIPS

Funded Grants and Fellowships

Principal Investigator (Co-PIs: Jori Hall and Julie Stanton), *Examining, Disrupting, and Transforming Inequitable Postsecondary Science Degree Trajectories for Rural Students using Participatory Action Research*, **Spencer Foundation**, 2023, **Grant total: \$75,000.**

Co-Principal Investigator (PI: Kristin Ray; Additional Co-Researchers: Nick Szoko, Loreta Matheo), *Supporting Black Aspiring Pediatricians in Supporting Black Youth Interested in Health Careers*, **University of Pittsburgh Medical Center Children's Hospital**, 2023-2025, **Grant total: \$25,000.**

Principal Investigator (Co-PI: Collette Chapman-Hilliard), *Investigating Postsecondary Education Access and Choice for Rural Black Students using a Participatory Mixed Methods Approach*, **Spencer Foundation**, 2021-2023, **Grant total: \$49,906.**

Co-Principal Investigator (PI: Julie Stanton), *Identifying the Community Cultural Wealth of Successful Black Science Students through Participatory Action Research*, **National Science Foundation's Improving Undergraduate STEM Education**, 2018-2023, **Grant total: \$299,958.**

Principal Investigator, *Investigating College Access and Choice for Rural Black Students using an Anti-Deficit Achievement Framework*, **National Academy of Education/Spencer Foundation Postdoctoral Fellowship Program**, 2017-2018, **Fellowship total: \$70,000.**

Principal Investigator, *Expanding the use of Assessment and Evaluation in a Community-based College Access and Preparation Program*, **American Educational Research Association's Education Research Service Project**, 2017-2018, **Grant total: \$3,020.**

Principal Investigator, *Beyond College Access and Choice*, **American College Personnel Association-College Student Educators International**, 2016-2018, **Grant total: \$3,000.**

Principal Investigator, *Rural, African American Students: College Access, Choice, and Retention*, **University of Georgia College of Education's Early Career Faculty Grant**, 2015-2016, **Grant total: \$5,932.**

Lead Project Manager and Grant Proposal Co-Author, *Successful Transitions: Supporting Underrepresented Students to Succeed in College and in Life*, **North Carolina Independent Colleges and Universities**, 2011, **Grant total: \$19,891.**

Co-Lead Project Manager and Grant Proposal Co-Author, *Elon University Summer Bridge*

Programs, North Carolina Independent Colleges and Universities, 2010, **Grant total: \$20,000.**

Co-Lead Project Manager and Grant Proposal Co-Author, *Elon Academy Transitions to College Program, North Carolina Independent Colleges and Universities*, 2009, **Grant total: \$14,972.**

Lead Project Manager and Grant Proposal Co-Author, *Elon Academy Business Partner Program, Workforce Innovation in Regional Economic Development Action Committee and Piedmont Triad Partnership*, 2008, **Grant total: \$10,800.**

Grants Under Review

Principal Investigator (Principal Investigator: Julie Stanton), *Collaborative Research: Participatory Action Research to Amplify the Community Cultural Wealth of Black Graduate Students and Disrupt Racial Inequities in Biology*, **National Science Foundation, Proposed total: \$1,382,319.**

RESEARCH AND PUBLICATIONS

*Indicates a co-author who was a high school, undergraduate, or graduate student at the time of the study/manuscript development.

Research and Scholarly Interests

Spatial, racial, and class equity in education; the influence of state and federal policy and economic, social, and educational conditions on educational access and opportunity; science education and equity; participatory action research; and visual methodology.

Books

Hallmark, T., Ardoin, S., & **Means, D. R.** (Eds.). (2023). *Race & rurality: Considerations for advancing higher education equity*. Routledge.

Garvey, J. C., Harris, J. C., **Means, D. R.**, Perez, R. J., & Porter, C. J. (Eds.). (2020). *Case studies for student development theory: Advancing social justice and inclusion in higher education*. Routledge.

- **Recipient of the 2021 Outstanding Publication Award from the NASPA Faculty Council and Faculty Assembly**

Journal Articles

Means, D. R. (accepted). At the crossroads: Postsecondary education access opportunities and constraints for rural Black students. *The Review of Higher Education*.

Breeden, R., **Means, D. R.**, Beckham, M.*, Rose, H.*, Walls, C.*, Idehen, O.*, Marshall, B.*, & Stanton, J. (2023). Black women, white coats: Black women undergraduate students' persistence to pursue healthcare careers. *Journal of Women and Minorities in Engineering and Science*, 29(4), 55-78.

Means, D. R., Stanton, J., Mekonnen, B.*, Oni, O.*, Breeden, R.*, Babatola, O.*, Osondu, C.*, Beckham, M.*, & Marshall, B.* (2022). A deeper calling: The aspirations and persistence of Black undergraduate students in science at a predominantly white institution. *The Review of Higher Education*, 46(2), 151-180.

- Boettcher, M. L., Lange, A., Hanks, S., & **Means, D. R.** (2022). Rural Black and Latinx students: Engaging community cultural wealth in higher education. *Journal of Research in Rural Education*, 38(1), 1-15.
- Azano, A. P., & **Means, D. R.** (2022). Rethinking equity and justice in rural organizations: Implications for policy and practice. *The Rural Educator*, 43(1), 110-114.
- Stanton, J., **Means, D. R.**, Babatola, O.*, Osondu, C.*, Oni, O.*, & Mekonnen, B.* (2022). Drawing on internal strengths and creating spaces for growth: How Black science majors navigate the racial climate at a predominantly white institution to succeed. *CBE-Life Sciences Education*, 21(1), 1-20.
- National Rural Postsecondary Research Agenda Working Group. (2021; invited). A national rural postsecondary research agenda. *The Rural Educator*, 42(3), 74-77.
- Means, D. R.**, Blackmon, S.*, Drake, E.*, Lawrence, P.*, Jackson, A., Strickland, A., & Willis, J.* (2021). We have something to say: Youth participatory action research as a promising practice to address problems of practice in rural schools. *The Rural Educator*, 41(3), 43-54.
- Hudson, T. D., **Means, D. R.**, & Tish, E.* (2020). Discovering my agency: Exploring how youth participatory action research facilitates the development of capital by underserved youth in a college access program. *Teachers College Record*, 122(1), 1-38.
- Coleman, R., Wallace, J.*, & **Means, D. R.** (2020; invited). Questioning a single narrative: Multiple identities shaping Black queer and transgender student retention. *Journal of College Student Retention: Research, Theory, and Practice*, 21(4), 455-475.
- Means, D. R.** (2019). Crucial support, vital aspirations: The college and career aspirations of rural Black and Latinx middle school students in a community- and youth-based leadership program. *Journal of Research in Rural Education*, 35(1), 1-14.
- Means, D. R.**, Hudson, T. D., & Tish, E.* (2019). A snapshot of college access and inequity: Using photography to illuminate the pathways to higher education for underserved youth. *The High School Journal*, 102(2), 139-158.
- Means, D. R.**, Collier, J.*, Bazemore-James, C.*, Williams, B.*, Coleman, R.*, & Anderson Wadley, B.* (2018). "Keep your spirit aligned": A case study on Black lesbian, gay, bisexual, and queer students defining and practicing spirituality. *Journal of College Student Development*, 59(5), 618-623.
- Means, D. R.**, & Pyne, K. B. (2017). Finding my way: Perceptions of institutional support and belonging in low-income, first-generation, first-year college students. *Journal of College Student Development*, 58(6), 907-924.
- **Most downloaded article from the *Journal of College Student Development* in 2022**
- Means, D. R.** (2017). "Quaring" spirituality: The spiritual counterstories and spaces of Black gay and bisexual male college students. *Journal of College Student Development*, 58(2), 229-246.
- Means, D. R.**, Beatty, C. C., Blockett, R. A., Bumbry, M., Canida, R. L., & Cawthon, T. W. (2017). Resilient scholars: Reflections from Black gay men on the doctoral journey. *Journal of Student Affairs Research and Practice*, 54(1), 109-120.
- Means, D. R.**, Clayton, A., Conzelmann, J., Baynes, P., & Umbach, P. D. (2016). Bounded aspirations: Rural, African American high school students and college access. *The Review of Higher Education*, 39(4), 543-569.

- Means, D. R.,** Bryant, I., Crutchfield, S., Jones, M., & Wade, R. (2016). Building bridges: College to career for underrepresented college students. *Journal of College Student Development*, 57(1), 95-98.
- Means, D. R.** (2016). "Everybody seems to get along...": An institutional case study about campus race relations. *College Student Affairs Journal*, 34(2), 16-28.
- Means, D. R.,** & Jaeger, A. J. (2016). "Keep pressing on": Spiritual epistemology and its role in the collegiate lives of Black gay and bisexual men. *Journal of College and Character*, 17(1), 23-39.
- Means, D. R.,** & Pyne, K. (2016). After access: Underrepresented students' post-matriculation perceptions of college access capital. *Journal of College Student Retention: Research, Theory, and Practice*, 17(4), 390-412.
- Ulmer, L. W., **Means, D. R.,** Cawthon, T., & Kristensen, S. (2016). Investigation of remedial education course scores as a predictor of introduction-level course performances: A case analysis at one for-profit institution. *Journal of College Student Retention: Research, Theory, and Practice*, 18(1), 109-130.
- Means, D. R.,** & Jaeger, A. J. (2015). Spiritual borderlands: A Black gay male college student's spiritual journey. *Journal of Student Affairs Research and Practice*, 52(1), 11-23.
- Means, D. R.,** LaPlante, K., & Dyce, C. (2015). Pushing education: Parental engagement, educational aspirations and college access. *Journal of Critical Scholarship on Higher Education and Student Affairs*, 1(1), 83-99.
- Scott, M. A., Pyne, K. B., & **Means, D. R.** (2015). Approaching praxis: YPAR as critical pedagogical process in a college access program. *The High School Journal*, 98(2), 138-157.
- Mitchell, D., Jr., & **Means, D. R.** (2014). "Quadruple consciousness": A literature review and new theoretical consideration for understanding the experiences of Black gay and bisexual men at predominantly White institutions. *Journal of African American Males in Education*, 5(1), 23-35.
- Means, D. R.,** & Jaeger, A. J. (2013). Black in the rainbow: "Quaring" the Black gay male student experience at historically Black universities. *Journal of African American Males in Education*, 4(2), 124-140.
- Pyne, K. B., & **Means, D. R.** (2013). Underrepresented and in/visible: A Hispanic first-generation student's narratives of college. *Journal of Diversity in Higher Education*, 6(3), 186-198.

Peer-Reviewed Manuscript Under Review

- Means, D. R.,** Chapman-Hilliard, C., & Page, C. H.* (revise and resubmit). A mixed methods, critical, participatory approach for studying and addressing rural Black youth's postsecondary education access and opportunity.
- Means, D. R.,** Willis, J.*, Getfield, K.*, Golden, D.*, Henriott, B.*, Lee, B.*, Medina, A.*, Reilley, H.*, Tunstall, L.*, & Zhou, Y.* (accepted with minor revisions) Rhetoric or change? Rural college student success and state policy.

Manuscripts in Preparation

- Means, D. R.,** Stanton, J., Beckham, M.*, Clemons, K.*, Frierson, M.*, Idehen, O.*, Rose, H.*, Breeden, R., & Marshall, B*. "I can't just give up and stop": Black undergraduate men navigating historically white institutions to persist in science degree programs.

Book Chapters

- Means, D. R., & Kniess, D. R.** (2023). Sociodemographic characteristics and college student persistence, retention, and graduation. In R. D. Reason & J. M. Braxton (Eds.), *Improving college student retention: New developments in theory, research, and practice* (pp. 97-122). Routledge.
- Ardoin, S., Garcia-Louis, C., & **Means, D. R.** (2022). How being a first-generation graduate influences faculty experiences. In M. B. Wallace (Ed.), *First generation professionals in higher education: Strategies for the world of work*. NASPA.
- Means, D. R.,** George, A.*, & Willis, J.* (2022). Rethinking postsecondary education access and success to advance racial equity for rural Black students. In R. M. Johnson, U. Anya, & L. M. Garces (Eds.), *Racial equity on college campuses: Connecting research and practice*. SUNY Press.
- Means, D. R., & Sansone, V.** (2021). Latinx students in rural schools. In A. P. Azano, K. Eppley, & C. Biddle (Eds.), *The Bloomsbury Handbook of rural education in the USA*. Bloomsbury.
- Means, D. R.** (2020). Social class and student development. In J. C. Garvey, J. C. Harris, D. R. Means, R. J. Perez, & C. J. Porter (Eds.), *Case studies for student development theory: Advancing social justice and inclusion in higher education* (pp. 101-104). Routledge.
- Means, D. R.** (2020). Spirituality and student development. In J. C. Garvey, J. C. Harris, D. R. Means, R. J. Perez, & C. J. Porter (Eds.), *Case studies for student development theory: Advancing social justice and inclusion in higher education* (pp. 76-79). Routledge.
- Means, D. R., & Perez, R. J.** (2020). Can I be both? Exploring the intersections of religious, spiritual, and sexual identities. In J. C. Garvey, J. C. Harris, D. R. Means, R. J. Perez, & C. J. Porter (Eds.), *Case studies for student development theory: Advancing social justice and inclusion in higher education* (pp. 86-88). Routledge.
- Means, D. R., & Coleman, R. D.*** (2018). African American men in STEM: A review of research and new directions. In L. A. Castenel, T. C. Grantham, & B. J. Hawkins (Eds.), *Recruiting, retaining, and engaging African-American males at selective prestigious research universities: Challenges and opportunities in academics and sports* (pp. 237-247). Information Age Publishing.
- Clayton, A. B., & **Means, D. R.** (2018). Access granted? Challenges, controversies, and opportunities around college access in American higher education. In J. Blanchard (Ed.), *Controversies on campus: Debating the issues confronting American universities in the 21st Century* (pp. 22-43). Praeger.
- Dean, L. A., & **Means, D. R.** (2016). Religious and spiritual diversity among college students. In M. Cuyjet, C. Linder, D. Cooper, & M. Howard-Hamilton (Eds.), *Multiculturalism on campus: Theory, models, and practices for understanding diversity and creating inclusion* (2nd ed., pp. 350-376). Stylus.

Reports

- Means, D. R.** (2018). *Supporting the pathways to postsecondary education for rural students: Challenges, opportunities, and strategies for moving forward*. National Association for College Admission Counseling.

Public Scholarship

- Newlin, M., Willis, J. & Means, D. R. (2021, October 21). Black students from rural spaces [Audio podcast episode]. In *The Rural College Student Experience*. <https://rcse.buzzsprout.com/1851976/9405035-episode-3-black-students-from-rural-spaces>
- Azano, A., Farmer, T., **Means, D. R.**, Williams, S. (2020, November 12). Rural education [Audio podcast episode]. In *Pitt Edcast*. <https://www.education.pitt.edu/news-and-media/pittedcast-podcast>
- Means, D. R.**, Jaeger, A. J., & Rebollar, C. (2018, January 10). What about DACA? [Web log post]. *The Atlanta Journal Constitution*. <http://getschooled.blog.myajc.com/2018/01/10/opinion-educators-must-help-undocumented-students-feel-safe-supported/>
- Means, D. R.** (2016, August 31). Rural location, race influence students' access to college [Web log post]. *The Atlanta Journal Constitution*. Retrieved from <http://getschooled.blog.myajc.com/2016/08/30/black-rural-and-impooverished-are-colleges-ignoring-these-students/>

Other Publications

- Coleman, R., & **Means, D. R.** (2021). Quare Theory. In K. K. Strunk & S. A. Shelton (Eds.), *Encyclopedia of queer studies in education*. Brill.
- Means, D. R.**, & Clines, A. K.* (2017). *The power of integrated learning: Higher education for success in life, work, and society* [Review of the book]. *Teachers College Record*. Retrieved from <http://www.tcrecord.org/Content.asp?ContentID=22080>.
- Means, D. R.**, & Montero, J. (2017, January 23). Preview of upcoming 2017 NASPA session on student spirituality with JCC authors [Web log post]. Retrieved from <https://www.naspa.org/publications/journals/posts/preview-of-upcoming-2017-naspa-session-on-student-spirituality>

SCHOLARLY AWARDS, RECOGNITIONS, AND FELLOWSHIPS

2023	Emerging Scholar, <i>Diverse: Issues in Higher Education</i>
2022	Dean's Distinguished Teaching Award, University of Pittsburgh's School of Education
2021-2022	Richard P. Nathan Public Policy Fellow, Rockefeller Institute of Government
2019-2020	Public Service and Outreach Fellowship, University of Georgia
2018	Mary McLeod Bethune Educator Award, University of Georgia's NAACP Chapter
2017-2019	Emerging Scholars, American College Personnel Association: College Student Educators International
2017-2018	Postdoctoral Fellow, National Academy of Education and Spencer Foundation
2015-2017	Lilly Teaching Fellow, University of Georgia's Center for Teaching and Learning (highly-selective teaching development program)
2015-2017	Grantsmanship Development Program, University of Georgia's Owens Institute for Behavioral Research
2015	Multicultural/Multiethnic Education Special Interest Group's Dr. Carlos J. Vallejo Memorial Award for Emerging Scholarship, American Educational Research Association

- 2015 Dissertation of the Year Award, Jon C. Dalton Institute on College Student Values
- 2015 “Roaring Ten” (Recognition of 10 young alumni), Clemson University
- 2014 First Place Dissertation of the Year Award, American Association for Blacks in Higher Education
- 2014 Standing Committee for LGBT Awareness Research Recognition Award, American College Personnel Association
- 2014 Standing Committee for Men and Masculinities Outstanding Research Award, American College Personnel Association
- 2013 Young Alumnus of the Year, Elon University
- 2011 Bobby E. Leach Award, Southern Association for College Student Affairs

PRESENTATIONS

*Indicates a co-presenter who was a high school, undergraduate, or graduate student at the time of the presentation.

Invited Keynotes, Speeches, Workshops, & Panels

National

- Means, D. R.**, Ardoin, S., Willis, J.*, & McNamee, T. (2022, March). *Rural student identity: A panel discussion*. Keynote panelist for Rural Student Success and Well-Being UnConference sponsored by the University of Georgia, Virtual Conference.
- Jones, A., **Means, D. R.**, & Okello, W. (2021, October). *Performance, visual, and digital methods workshop*. Presenter for a research methods workshop sponsored by the Association for the Study of Higher Education, Virtual Workshop.
- Means, D. R.** (2021, March). *Rural student success & well-being: Where are we now?* Keynote speaker for Redefining Rural Students’ Success and Well-Being: An Unconference on Practice, Research, and Innovation sponsored by the University of Georgia, Virtual Conference.
- Means, D. R.** (2021, March). *The pebble in the ripple effect: The possibilities of mentoring and advising in higher education*. Keynote Speaker for the Mentoring and Advising Summit sponsored by the University of Pittsburgh, Virtual Summit
- Ardoin, S., Arrellano, M., Brown, L., Erb, M., martinez, b., McNamee, T., & **Means, D. R.** (2021, March). *NASPA community dialogue: Responding to students’ changing needs*. Keynote panelist for the NASPA Conference, Virtual Conference
- Ebert, J., **Means, D. R.**, Reykdal, C., & Utin, E. T. (2020, November). *Supporting rural Students of Color*. Panelist for The Hunt Institute’s Homeroom with Education Leaders, Virtual Presentation.
- Means, D. R.** (2019, July). *“Quaring” spirituality: The spiritual counterstories and spaces of Black queer college students*. Keynote speaker for Convergence’s Summer Webinar Series.
- Means, D. R.** (2019, February). *Supporting queer Students of Color in higher education*. Keynote speaker for the Jon C. Dalton Institute on College Student Values, Tallahassee, FL

Mather, P., **Means, D. R.**, & Montero, J. (2017, March). *Journal of College and Character's special authors' session on spirituality*. Panel presented at NASPA: Student Affairs Professionals in Higher Education, San Antonio, TX.

State

Means, D. R. (2023, July). *Enhancing advising and mentoring for first-generation college students*. Invited presenter for the West Virginia Student Success Summit, Charleston, WV.

Means, D. R. (2023, July). *Improving college access for first-generation college students*. Invited presenter for the West Virginia Student Success Summit, Charleston, WV.

Henderson, Z., **Means, D. R.**, DeBaun, B., & Perry, A. (2023, April). *Achieving West Virginia's postsecondary attainment goal*. Invited Resource Expert for West Virginia Legislators Retreat, Shepherdstown, WV.

Decker, W., Turner, M., & **Means, D. R.** (2022, January). *Achieving West Virginia's postsecondary attainment goal*. Invited Resource Expert for West Virginia Legislators Retreat, Virtual Keynote.

Zamani-Gallaher, E., Baston, M., **Means, D. R.**, & Ruedas-Gracia, N. (2021, July). *Fostering diversity, equity, inclusion, and belonging for the success of all learners*. Keynote panelist for the Illinois Student Assistance Commission's College Changes Everything Conference, Virtual Conference.

Means, D. R. (2018, December). *The bridge builders of education: Supporting pathways to postsecondary education for rural students*. Keynote speaker for the Southern Association for College Admission Counseling's Georgia State and Area Initiatives meeting, Bogart, GA.

Local and University

Means, D. R. (2023, January). *Reimagining teaching and mentoring to elevate first-generation college students success*. Keynote speaker at Butler County Community College, Butler, PA.

Means, D. R. (2022, November). *Reimagining teaching, advising, and mentoring to elevate first-generation college student success*. Keynote speaker at York College of Pennsylvania, York, PA.

Means, D. R. (2022, November). *The power of being 1st: Discovering your strengths and agency as first-generation college students*. Keynote speaker at York College of Pennsylvania, York, PA.

Means, D. R. (2022, November). *Considering a rural geographical context to advance equity and justice in higher education*. Invited speaker at University of Pittsburgh's School of Social Work, Virtual Keynote.

Kane, K., **Means, D. R.**, Niepa, T., Oriola, E., & Williams-Moore, L. (2022, November). *First-generation proud: First-person stories*. Invited panelist for University of Pittsburgh's First-Generation College Celebration Day, Pittsburgh, PA.

Coady, M., Crumb, L., Knott, E., **Means, D. R.**, Red Corn, A., Whitten, C., & Sander, K. (August, 2022). *Supporting diverse populations in rural contexts*. Invited panelists for Virginia Tech's Rural Education Summit, Blacksburg, VA.

- Means, D. R.** (2022, April). *Postsecondary education access and equity for rural Black students*. Keynote speaker for Harvard University's National Center for Rural Education Research Networks, Virtual Keynote.
- Means, D. R.** (2022, March). *Critical Race Theory and career advising and development*. Invited speaker for University of Pittsburgh's Career Center, Virtual Presentation.
- Means, D. R.** (2022, February/March). *Enhancing advising and mentoring for first-generation college students*. Invited keynote speaker at Hope College, Virtual Keynote.
- Means, D. R.** (2022, January). *The ripple effects of higher education: Considering a rural geographical context to advance equity and justice in teaching and learning*. Keynote at Penn State University's Schreyer Institute for Teaching Excellence Conference, Virtual conference.
- Means, D. R.** (2021, May). *Commencement address*. Commencement speaker for Elon University's Master's Program in Higher Education, Elon, NC.
- Means, D. R.** (2020, October). *You can't go home again? Troubling deficit-based perspectives about first-generation college students*. Keynote speaker for Carroll Community College's webinar series.
- Means, D. R.** (2019, September). *Supporting pathways to postsecondary education for rural Black students*. Speaker for community and school leaders in Colquitt County, GA. Moultrie, GA.
- Means, D. R.** (2019, April). *Rural Black students and college access*. Keynote speaker for Teachers College's 2nd Annual Rural Education & Healthcare Symposium, New York, NY.
- Means, D. R.** (2019, April). *Supporting pathways to postsecondary education for rural Black students*. Speaker for community and school leaders in Washington County, Sandersville, GA.
- Means, D. R.** (2019, March). *Identifying the community cultural wealth of successful Black science students through participatory action research*. Speaker for University of Georgia's Interdisciplinary Qualitative Studies Speaker Series, Athens, GA.
- Means, D. R.** (2019, March). *At a crossroads: Rural Black students and the developing and shifting pathways to postsecondary education*. Speaker for University of Georgia's Archway Summit, Athens, GA.
- Means, D. R.** (2018, March). *Investigating college access and choice for rural Black students*. Speaker for the College of Education's Superintendent Advisory Council at the University of Georgia, Athens, GA.
- Means, D. R.** (2018, November). *Rurality, race, and postsecondary education access and success*. Speaker for the Office of Institutional Diversity's Dialogues in Diversity Series at the University of Georgia, Athens, GA.
- Means, D. R.** (2018, February). *Howdy is not enough: Creating a truly inclusive environment at Texas A&M*. Keynote speaker for Texas A&M University's Division of Student Affairs Staff, College Station, TX.
- Means, D. R.** (2018, February). *Resisting the 'Sunken Place': Rising up and speaking out at this critical juncture in time*. Keynote speaker for Wofford College's and Converse College's MLK Unity Week, Spartanburg, SC.
- Means, D. R.** (2018, February). *Demonized no more: The spiritual journeys and spaces of Black gay and bisexual men in college*. Keynote speaker for the University of Georgia's Wilson Center Seminar Series on Religion and the Common Good, Athens, GA.

- Means, D. R.** (2017, July). *Social justice praxis: Enhancing college-going pathways for marginalized student populations*. Presenter for workshop presented to the Georgia College Advising Corps, Athens, GA.
- Burroughs, C. Y., Castenell, L. A., Hill, J. R., Linder, C., **Means, D. R.**, & Pope, E. M. (2016, October). *Looking back to move forward: diversity, equity, and inclusion*. Panel presented to University of Georgia's College of Education, Athens, GA.
- Means, D. R.** (2016, May). *Social justice and student affairs*. Keynote speaker for Middle Georgia State University's Student Affairs Staff, Cochran, GA.
- Means, D. R.** (2016, February). *Understanding social justice*. Workshop presented to University of Georgia's Student Support Services, Athens, GA.
- Means, D. R.** (2015, November). *Demonized no more: The spiritual journeys and spaces of Black gay and bisexual men in higher education*. Research presentation for the Dean's Council on Diversity Seminar, University of Georgia College of Education, Athens, GA.

Conference Presentations

- Means, D. R.**, Chapman-Hilliard, C., & Page, C.* (2024, April). *Developing a critical, quantitative scale: Lessons learned studying rural Black youth's postsecondary education access*. Paper to be presented at the American Educational Research Association, Philadelphia, PA.
- Hallmark, T., Bott-Lyons, T., Collins, J., Levin, H., **Means, D. R.**, & Sowl, S. (2024, April). *Race and rurality in research, policy, and practice*. Symposium to be presented at the American Educational Research Association, Philadelphia, PA.
- McNamee, T., **Means, D. R.**, Sansone, V., & Tate, B. (2024, April). *Supporting the higher education access and success of rural students with additional marginalized identities*. Symposium to be presented at the American Educational Research Association, Philadelphia, PA.
- Ardoin, S., Cain, E., Combs, L. D., **Means, D. R.**, Rockey, M., & Wright, N. (2024, March). *Race & rurality intersections in policy, STEM, & multiraciality*. Session to be presented at ACPA: College Student Educators International, Chicago, IL.
- Chapman-Hilliard, C., **Means, D. R.**, & Page, C.* (2024, January). *Advancing scale development for Black rural youth populations: An asst-based, culturally relevant approach*. Symposium to be presented at the National Multicultural Conference & Summit, Santa Fe, NM
- Means, D. R.**, Stanton, J., Beckham, M.*, Clemons, K.*, Frierson, M.*, Idehen, O.*, Rose, H.*, Breeden, R., & Marshall, B*. (2023, April). *"I can't just give up and stop": Black undergraduate men navigating historically white institutions to persist in science degree programs*. Paper presented at the American Educational Research Association, Chicago, IL.
- Means, D. R.**, Willis, J.*, & Henriott, B.* (2022, October). *Rhetoric or change? Rural college student success and state policy*. Research presented at the National Rural Education Association, Green Bay, WI.
- Azano, A. P., Chambers, C. R., Coady, M. R., Red Corn, A., Crumb, L., **Means, D. R.**, & Sansone, V. A. (2022, April). *Why place? How rural education research can in/transform systems for equitable education*. Invited Presidential Session presented at the American Educational Research Association, San Diego, CA.

- Brenner, D. G., Biddle, C., Buffington, P. J., Byun, S-y., Hartman, , S. L., **Means, D. R.**, Robert, K., & Witham, K. (2022, April). *Highlighting the future of rural education: Research agendas for rural Pre-K-12 and postsecondary education*. Working group roundtable presented at the American Educational Research Association, San Diego, CA.
- Manson, S., **Means, D. R.**, Rockenbach, A. N., & Sniples, J. (2022, March). *(Un)comfortable being here: How campus climate impacts belonging among Black students*. Session presented at NASPA, Baltimore, MD.
- Schorr, D., Romasanta, L., Jehangir, R., Molengraff, T., Longwell-Grice, R., **Means, D. R.**, & Nguyen, D. (2022, March). *Explicit and implicit approaches to publishing about first-generation student success*. Session presented at NASPA, Baltimore, MD.
- Means, D. R.**, & Hayes, J.* (2021, April). *Postsecondary education access and equity for rural Black students: Implications for practice and policy*. Research presentation for the Rural College Access and Success Summit, Virtual Conference.
- Means, D. R.**, Brown, A.* , Hayes, J.* , & Willis, J.* (2021, April). *Capturing postsecondary education access for rural Black students through participant-generated photographs*. Roundtable presented at the American Educational Research Association, Virtual Conference.
- Means, D. R.**, Stanton, J. D., Beckham, M.* , Breeden, R. L.* , Idehen, O.* , Rose, H.* , Walls, C.* , & Marshall, B.* (2021, April). Black women, white coats: Black women undergraduate students' persistence to pursue healthcare careers. Paper presented at the American Educational Research Association, Virtual Conference.
- Clayton, A. B., **Means, D. R.**, Breeden, R. L.* , Bostick, D.* , & Jackson, P.* (2021, April). *A "safety net" for college students experiencing food and housing insecurity: A campus-based resource case study*. Paper presented at the American Educational Research Association, Virtual Conference.
- Tieken, M. C., Corn, A. R., Hayman, J., McHenry-Sorber, E., **Means, D. R.**, Smalls, T., Sutherland, D. H., & Williams, J. (2021, April). *Rural and...: A symposium on intersectional diversity in rural education research*. Symposium presented at the American Educational Research Association, Virtual Conference.
- McGowan, B., Grimes, J., Hotchkins, B., McGuire, K., & **Means, D. R.** (2020, November). *Using visual methods to understand Black men's perspectives on racism, identity, mental health, and success*. Symposium presented at the Association for the Study of Higher Education, Virtual Conference.
- Blockett, R., Duran, A., Jourian, T. J., Mobley, S., **Means, D. R.**, & Jackson, R. (2019, November). *Reimagining logics: A Queer of Color critique of higher education research, practice, & policy*. Symposium presented at the Association for the Study of Higher Education, Portland, OR.
- Brooms, D. Parler, B., Johnson, J., Johnson, R., **Means, D. R.**, & Mobley, S. (2019, November). *Re-imagining research on Black higher education*. Symposium presented at the Association for the Study of Higher Education's Council on Ethnic Participation Pre-Conference, Portland, OR.
- Hallmark, T., Ardoin, S., Shotton, H., **Means, D. R.**, Sansone, V. A., & Youngbull, N. R. (2019, November). *Rurality across race and ethnicity*. Symposium presented at the Association for the Study of Higher Education, Portland, OR.

- Jackson, A., Elliott, M., & **Means, D. R.** (2019, October). *Connecting research and rural Georgia: Serving minority students through community-based research*. Symposium presented at the Engaged Scholarship Consortium, Denver, Colorado.
- Means, D. R.**, Stanton, J., Oni, O.*, & Mekonnen, B.* (2019, April). *Identifying the Community Cultural Wealth of Black undergraduate students in science*. Paper presented at the American Educational Research Association, Toronto, Canada.
- Means, D. R.** (2018, October). *What about us? Rural Black men and college access inequities*. Paper presented at the International Colloquium on Black Males in Education, Dublin, Ireland.
- Means, D. R.** (2018, October). *Anti-deficit achievement approach: Rural Black students' access to postsecondary education*. Paper presented at the National Forum to Advance Rural Education, Denver, CO.
- Means, D. R.** (2018, May). *Investigating college access and choice for rural Black students using an anti-deficit achievement framework*. Paper presented at the International Congress of Qualitative Inquiry, Champaign, IL.
- Means, D. R.** (2018, April). *A snapshot of college access: Rural Black students and community cultural wealth*. Poster presented at the American Educational Research Association, New York, NY.
- Blockett, R., McCoy, S., **Means, D. R.**, Rankin, S., Robinson, S., & Stygles, K. (2018, March). *Scholarship margin to center: Centering race in LGBTQ+ higher education and student affairs research*. Program presented at the American College Personnel Association: College Student Educators International, Houston, TX.
- Garvey, J., Harris, J., **Means, D. R.**, Perez, R., & Porter, C. (2018, March). *Teaching to transgress: Critical pedagogy in student affairs programs*. Program presented at the American College Personnel Association: College Student Educators International, Houston, TX.
- Williams, Q.*, & **Means, D. R.** (2018, March). *Disrupting deficits: Community cultural wealth and supporting minoritized student populations*. Program to be presented at the American College Personnel Association: College Student Educators International, Houston, TX.
- Means, D. R.** (2017, April). *Rural African American and Latino middle school students and college access*. Paper presented at the American Educational Research Association, San Antonio, TX.
- Means, D. R.**, Beemyn, G., Blockett, R., Garvey, J., Kosar, A., Linley, J., Mobley, S., Mollet, A., Pryor, J., Robinson, S., & Stygles, K. (2017, March). *Queering research: A symposium on LGBTQ+ research in student affairs*. Symposium presented at the American College Personnel Association: College Student Educators International, Columbus, OH.
- Ardoyn, S., Carducci, R., Marine, S., & **Means, D. R.** (2017, March). *Positioning yourself for the practitioner to professor pipeline*. NASPA: Student Affairs Professionals in Higher Education, San Antonio, TX.
- Means, D. R.**, Hudson, T. D., & Tish, E. (2016, November). *A snapshot of college access and inequity: Photovoice and the pathways to higher education for underserved youth*. Paper presented at the Association for the Study of Higher Education, Columbus, OH.
- Means, D. R.**, Hudson, T. D., & Tish, E.* (2016, April). *College bound: Youth participatory action research and the college-going experiences of underserved youth*. Paper presented at the American Educational Research Association, Washington, D.C.

- Stygles, K., **Means, D. R.**, Denton, M., & Ortis, L. (2016, March). *Emerging LGBT+ scholarship in student affairs and higher education*. Panel presented at the American College Personnel Association: College Student Educators International, Montreal, Canada.
- Blockett, R., **Means, D. R.**, Dortch, M., & Beatty, C. (2016, March). *Intersectional identity politics: The paradox of Black queer identity formations in college*. Panel presented at the American College Personnel Association: College Student Educators International, Montreal, Canada.
- Hobson, K., Lange, A., Peterson, P., & **Means, D. R.** (2016, March). *Disrupting the binary: Creating trans* inclusive college and university campuses*. Panel presented at the American College Personnel Association: College Student Educators International, Montreal, Canada.
- Joyce, B., Cawthon, T., Brown, J., Dunn, M., & **Means, D. R.** (2016, March). *Faculty, practitioner, or both? Career decisions for student affairs professionals*. Panel presented at the American College Personnel Association: College Student Educators International, Montreal, Canada.
- Nguyen, D., Renn, K., Johnston, M., Kortegast, C., **Means, D. R.**, & Metcalfe, A. (2015, November). *A picture is worth a thousand words: Using visual research methods to unlock new understandings of student and campus life*. Panel presented at the Association for the Study of Higher Education, Denver, CO.
- Means, D. R.**, Coleman, R.*, & Collier, J.* (2015, November). *Student development reconsidered: Sexual orientation, race, spirituality and the collegiate experiences of lesbian, gay, and bisexual students*. Roundtable presented at the Association for the Study of Higher Education, Denver, CO.
- Means, D. R.**, Alonso-Dionicio, J.*, Morales-Santos, A.*, & Rebollar, C.* (2015, November). *In pursuit of the "American Dream": The educational journeys of undocumented college students in the American South*. Program presented at the Southern Association for College Student Affairs, Greenville, SC.
- Means, D. R.**, Gordon, B.A., Archibald, J., Bullard, R., Canida, R., Lynch, C., & Smith, T. (2015, November). *Let's Talk: Black men navigating the field of student affairs*. Panel presented at the Southern Association for College Student Affairs, Greenville, SC.
- Means, D. R.**, & Jaeger, A. J. (2015, March). *Spiritual meaning-making and the collegiate lives of Black gay males*. Paper presented at the American College Personnel Association: College Student Educators International, Tampa, FL.
- Means, D. R.**, Hudson, T., Alonso-Dionicio, J.*, Breen, L.*, Cuevas, D.*, Davis, B.*, Ellington, S.*, Melgoza-Rodriguez, M.*, Ramirez, J.*, Torain, K.*, Troxler, K.*, & Wilkins, B.* (2015, March). *From the margins to the center: Youth participatory action research*. Program presented at the American College Personnel Association: College Student Educators International, Tampa, FL.
- Jourian, T. J., Alcantar, C., **Means, D. R.**, Stovall, D., Teranishi, R., & Zaleski, N. (2015, March). *Reframing community partnerships and academic research: Centering the public good*. Program presented at the American College Personnel Association: College Student Educators International, Tampa, FL.
- Linder, C., Stapleton, L., Garvey, J., Kanagala, V., **Means, D. R.**, Taub, D., & Williams, M. (2015, March). *At the intersections: Social identities and faculty job searchers*. Panel

presented at the American College Personnel Association: College Student Educators International, Tampa, FL.

Means, D. R., Clayton, A., Conzelmann, J., Baynes, P., & Umbach, P. (2014, November).

Bounded aspirations: Rural, African American high school students and college access.

Paper presented at the Association for the Study of Higher Education, Washington, D.C.

Hughes, B., Renn, K., Abes, E., Jourian, T.J., **Means, D. R.,** Denton, M., & Robinson, C.S.

(2014, November). *Queering the academy: Queer theory as a theoretical foundation in higher education research.* Symposium presented at the Association for the Study of Higher Education, Washington, D.C.

Means, D. R., & Kniess, D. (2014, November). *Supporting underrepresented college students:*

Lessons learned from research. Program presented at the Southern Association for College Student Affairs, Louisville, KY.

Means, D. R., & Johnson, J. (2014, November). *Policy, equity, and the support of college students who are undocumented.* Program presented at the Southern Association for College Student Affairs, Louisville, KY.

Means, D. R. (2014, October). *Narrative and the exploration of Black gay male college students' pre-collegiate experiences.* Paper presented at the National LGBTQ Symposium, East Lansing, MI.

Means, D. R. (2014, October). *"Quaring" the Lens: Data collection through photography and the collegiate experiences of Black gay men.* Paper presented at the National LGBTQ Symposium, East Lansing, MI.

Means, D. R., Hudson, T., Alonso-Dionicio, J.*, Breen, L.*, Cuevas, D.*, Davis, B.*, Ellington, S.*, Melgoza-Rodriguez, M.*, Ramirez, J.*, Torain, K.*, Troxler, K.*, & Wilkins, B.* (2014, October) *Envisioning a New Way to Collaborate with Underrepresented Students: Youth Participatory Action Research.* Program presented at the North Carolina College Personnel Association, Raleigh, NC.

TEACHING

University of Pittsburgh

Graduate Instruction:

- Foundations for the Study of Higher Education (Ph.D.)
- Human Resources in Higher Education (Ed.D.)
- Advising and Supporting Skills for Higher Education Professionals (M.Ed.)
- Assessment in Higher Education (M.Ed.)
- Higher Education Capstone (M.Ed.)
- Higher Education Organizational Development (M.Ed.)
- Higher Education Administration (M.Ed.)

University of Georgia

Graduate Instruction:

- Administration and Finance of Student Affairs (Ph.D.)
- Collaboration in Higher Education (Ph.D.)
- Organizational Development in Higher Education (Ed.D.)
- Qualitative Research (Ed.D.)

- Research Methods in Higher Education/Student Affairs (M.Ed.)
- College Student Affairs Internship (M.Ed.)
- Structured Group Interventions/Student Group Development (M.Ed.)
- Interpersonal Intervention and Facilitation II (College Access and Persistence, Career Development, and Supervision) (M.Ed.)
- Issues in Student Affairs Administration (College Access and Persistence) (M.Ed.)

Undergraduate Instruction:

- Black Men in Higher Education: Race, Gender, and Predominantly White Institutions (First-Year Seminar)
- Rise Up and Speak Out: Understanding and Addressing Social Inequities (First-Year Seminar)

North Carolina State University

Graduate Instruction:

- Foundations of Higher Education Research (TA; Ph.D.)
- Masters Professional Seminar (TA; M.Ed.)
- Administration and Finance of Student Affairs (TA; M.Ed.)

Elon University

Undergraduate Instruction:

- Elon 101 (Introduction to College)
- Transition Strategies (Career Development course with a focus on diverse student populations)

ADVISING

Chairperson, Doctoral Dissertation Defended:

1. Natasha Beckett (2019), *Higher education passport: A narrative inquiry exploring the college going capital of TRIO Upward Bound participants*. Ed.D., Student Affairs Leadership, University of Georgia.
2. Danielle Bostick (2021), *The individual and shared narratives of Black women repaying student loan debt*. Ph.D., College Student Affairs Administration, University of Georgia.
3. Roshaunda Breeden (2021), *"Miles away, but in our backyard": A participatory action study examining relationships between historically white institutions and Black communities*. Ph.D., College Student Affairs Administration, University of Georgia.
Association for the Study of Higher Education's Bobby Wright Dissertation of the Year Award. Dissertation of the Year Award from the Southern Association for College Student Affairs. Marylu K. McEwen Dissertation of the Year Award from ACPA.
4. Ashley Brown (2021), *Dwell in possibility: A narrative study on the lived experiences of undocumented students' sense of belonging in the United States*. Ed.D., Student Affairs Leadership, University of Georgia.
5. Lamesha Brown (2019), *"I've been conditioned to navigate": First-generation Black doctoral women and their persistence at a predominantly white institution*. Ph.D., College Student Affairs Administration, University of Georgia.

6. Michael Jeremy Brown (2020), *Black men in engineering doctoral programs: Exploring persistence and achievement*. Ed.D., Student Affairs Leadership, University of Georgia.
7. Willene Patrice Brown (2018), *From the war room to the classroom: An exploration of sense of belonging for student veterans*. Ed.D., Student Affairs Leadership, University of Georgia.
8. Amy Clines (2019), *The continuation of college choice: A phenomenological study of the 4-year to 4-year collegiate transfer experience*. Ed.D., Student Affairs Leadership, University of Georgia.
9. Raphael Coleman (2018), *"Quaring" resiliency: Exploring resiliency among Black, gay, bisexual, and same gender loving men at predominantly white institutions*. Ph.D., College Student Affairs Administration, University of Georgia.
10. Christy Dinkins (2019), *Let me be spiritual: Narratives of Black undergraduate women at predominantly white institutions*. Ed.D., Student Affairs Leadership, University of Georgia.
11. Michelle Fullem (2023), *Examining the effectiveness of implementing a stay interview process to impact retention of information technology staff in higher education*. Ed.D., Higher Education, University of Pittsburgh.
12. Corey Langston (2020), *An anti-deficit perspective on Black men in resident assistant positions at predominantly white institutions in Georgia*. Ed.D., Student Affairs Leadership, University of Georgia.
13. Chrystal McDowell (2020), *Exploring African American first-generation graduates' successful navigation of a large public predominantly white institution in the Southeast*. Ed.D., Student Affairs Leadership, University of Georgia.
14. Joanna Mittereder (2023), *Supporting adopted college students: Developing student-ready student affairs professionals*. Ed.D., Higher Education, University of Pittsburgh.
15. Nicole Phillips (2021), *"See us. Hear us. Make room for us.": Exploring Black student affairs professionals' sense of belonging in a race-based employee affinity group*. Ed.D., Student Affairs Leadership, University of Georgia.
16. Leah Tompkins (2020), *Exploring academic advising and graduation at a small, private, liberal arts, religiously affiliated institution*. Ed.D., Student Affairs Leadership, University of Georgia.
17. Jason Wallace (2020), *"The ancestors are watching; Make them proud": Narratives exploring Black first-generation doctoral recipients' use of cultural capital during their terminal degree journey at non-Black serving institutions*. Ph.D., College Student Affairs Administration, University of Georgia. Fourth Place Dissertation of the Year Award from the American Association of Blacks in Higher Education.
18. Melvin Whitehead (2020), *Facing the disagreeable mirror: A critical counternarrative exploring how white college students make meaning of and evade confronting racism in their environments*. Ph.D., College Student Affairs Administration, University of Georgia.
19. Brittany Williams (2019), *"I did everything I was supposed to": Black women administrative professionals' push out and opt out of higher education workplaces*. Ph.D., College Student Affairs Administration, University of Georgia. First Place Dissertation of the Year Award from the American Association of Blacks in Higher Education. Dissertation of the Year Award from the Southern Association for College Student Affairs.

20. Jenay Florence Elizabeth Willis (2023). *"We gotta think about our community as a collective": A YPAR study to address rural Black students' college-going culture experiences*. Ph.D., Higher Education, University of Pittsburgh. Chance Memorial Research Award for Excellence in Dissertation Research from the National Rural Education Association.

Major Advisor, Doctoral Students:

1. Sharla Anke, Ed.D., Higher Education, University of Pittsburgh
2. Mollie Cecere, Ed.D., Higher Education, University of Pittsburgh
3. Susan Graff, Ed.D., Higher Education, University of Pittsburgh
4. Valerie Kerr, Ed.D., Higher Education, University of Pittsburgh
5. Jordan King, Ph.D., Higher Education, University of Pittsburgh
6. Michele Lagnese, Ed.D., Higher Education, University of Pittsburgh
7. Tiwanda Taylor, Ed.D., Higher Education, University of Pittsburgh

Committee Member, Doctoral Dissertation Defended:

1. Christian Alberto (2021). *"My race/ethnicity is an asset": Recruiting racially minoritized students to optometry school by acknowledging their community cultural wealth*. Ed.D., Higher Education, University of Pittsburgh.
2. Lauri Benton (2017). *Second-Generation African-American college students: Perspectives and experiences of earning an undergraduate degree*. Ph.D., Counseling and Student Personnel Services, University of Georgia.
3. Benjamin Bigalke (2019). *Memorable messages received during freshman year of college*. Ed.D., Student Affairs Leadership, University of Georgia.
4. India Blackburn (2018). *The impact of the campus environment on homeless student persistence to graduation*. Ed.D., Student Affairs Leadership, University of Georgia.
5. Christina Clarke (2019). *The experience of satisfied African American couples: The role emotional intimacy plays in the process*. Ph.D., Counseling Psychology, University of Georgia.
6. Donald Coleman (2022). *"First but not the last": The lived experiences of early career, first generation student affairs professionals*. Ed.D., Student Affairs Leadership, University of Georgia.
7. Joan Collier (2017). *Using sista circle methodology to examine sense of belonging of Black women in doctoral programs at a historically white institution*. Ph.D., College Student Affairs Administration, University of Georgia.
8. Melissa Dempsey (2020). *Impact of an outdoor orientation program on belonging and retention*. Ed.D., Student Affairs Leadership, University of Georgia.
9. Kevin Dietrick Jr. (2022). *Developing strategies to address enrollment inequities for Black and Latinx students in an interdisciplinary graduate program that spans business, tech, and STEM fields*. Ed.D., Higher Education, University of Pittsburgh.
10. Ashley Dobbs (2018). *The metamorphosis of black butterflies: A narrative inquiry examining persistence factors of African American undergraduate women attending a predominantly white institution*. Ed.D., Student Affairs Leadership, University of Georgia.

11. Natalie Edirmanasinghe (2019). *Immigrant student success: How do school counselors support immigrant students in K-12 school settings?* Ph.D., Counseling and Student Personnel Services, University of Georgia.
12. Linda Epstein (2019). *Latino student voices: From college access to campus environments*. Ed.D., Student Affairs Leadership, University of Georgia.
13. Jason Fitzer (2018). *Professional perspectives: Exploring how student affairs professionals approach working with Students of Color*. Ph.D., College Student Affairs Administration, University of Georgia.
14. Justin Grimes (2018). *Motivating factors impacting Black men's pursuit of a doctoral degree in education*. Ph.D., College Student Affairs Administration, University of Georgia.
15. Zoe Johnson (2018). *Black faces in white Spaces: Exploring the influence of social support on the experience of Black students at predominantly white institutions*. Ph.D., College Student Affairs Administration, University of Georgia.
16. Darren Jones (2019). *Examining differences in job satisfaction and organizational commitment of Black student affairs professionals at PWIs and HBCUs*. Ed.D., Student Affairs Leadership, University of Georgia.
17. Jillian Martin (2017). *The stool must not touch the ground: Student and community affairs at a liberal arts institution in Ghana, West Africa*. Ph.D., College Student Affairs Administration, University of Georgia.
18. Travis Martin (2019). *An examination of the relationship between fraternity and sorority membership type and socially responsible leadership*. Ph.D., College Student Affairs Administration, University of Georgia.
19. Honi Migdol (2016). *Exploring the ways in which students from low socioeconomic backgrounds experience a sense of belonging at elite institutions*. Ed.D., Student Affairs Leadership, University of Georgia.
20. Judith Pannell (2018). *The experiences of multiracial and biracial women senior and mid-level administrators in higher education*. Ed.D., Student Affairs Leadership, University of Georgia.
21. Tyrone Smiley (2021). *How my brothers kept me: A narrative study exploring a sense of belonging for first-generation Black men who joined a Black Greek Letter Organization at a predominantly white institution*. Ed.D., Student Affairs Leadership, University of Georgia.
22. Demetrius Smith (2018). *I am my brother's keeper: A narrative perspective of the lived experiences of Black men professionals in student affairs who mentor undergraduate Black men in the BLM era*. Ed.D., Student Affairs Leadership, University of Georgia.
23. Thelbert Snowden, Jr. (2019). *Career pathways and experiences of African American/Black presidents at historically white liberal arts colleges*. Ed.D., Student Affairs Leadership, University of Georgia.
24. Terah James Stewart (2019). *"Dear higher education, There are sex workers on your campus": Rendering visible the realities of U.S. college students engaged in sex work*. Ph.D., College Student Affairs Administration, University of Georgia.
25. Donna Lee Sullins (2016). *Counter-Storytelling: Extended orientation transitions to college by Students of Color at a predominantly white institution*. Ed.D., Student Affairs Leadership, University of Georgia.

Committee Member, Doctoral Students:

1. Marques Dexter, Ph.D., Sport Management, University of Georgia
2. Bernard Green, Ph.D., College Student Affairs Administration, University of Georgia
3. Sarah Kurz, Ph.D., Higher Education, University of Pittsburgh
4. Tammy Lane, Ph.D., Educational Leadership/Higher Education, Prairie View State University

Advisement of Master's Students, University of Georgia and University of Pittsburgh

- Advised over 20 master's students in college student affairs administration and higher education programs.

Advisement of Undergraduate Students, Elon University

- Advised 15 first-year and second-year students during the 2009-2011 academic years until they declared a major.

SERVICE**University Service***University of Pittsburgh, Pittsburgh, PA*

2023-Present	Co-Chair, Faculty Search in the Department of Educational Foundations, Organizations, and Policy (appointed)
2023-Present	Member, Dean Search in the School of Education (appointed)
2023-Present	Member, School of Education Equity and Justice Committee (elected)
2022-Present	Member, School of Education Tenure and Promotion Committee (elected)
2022-Present	Faculty Mentor, Department of Educational Foundations, Organizations, and Policy
2022-2023	Co-Chair, Faculty Search in the Department of Educational Foundations, Organizations, and Policy (appointed)
2020-2023	Member and EdD in Higher Education Coordinator and Representative, Division of Innovative Leadership in the School of Education
2020-2021	Co-Chair, Faculty Search in the Department of Educational Foundations, Organizations, and Policy (appointed)

University of Georgia, Athens, GA

2018-2020	Member, University Council
2018-2020	Member, University Council's Faculty Affairs Committee
2015-2017	Co-Advisor, Social Justice Leaders of the Department of Counseling and Human Development Services
2014, 2015, 2016	Faculty Search Committee Member, Department of Counseling and Human Development Services
2015	Member, College of Education Alumni Awards Committee (appointed)
2015	Member, College of Education Undergraduate Research Grant Selection Committee
2015	Small Group Facilitator, Ignite Social Justice Institute
2014-2015	Member, College of Education Faculty/Graduate Student Research Conference (appointed)

Editorial Service

2022-Present	Associate Editor, <i>Journal of Higher Education</i>
2023-Present	Editorial Board Member, <i>Journal of Diversity in Higher Education</i>
2019-Present	Editorial Board Member, <i>Journal of Research in Rural Education</i>
2019-Present	Editorial Board Member, <i>The Rural Educator</i>
2017-2023	Editorial Board Member, <i>Journal of College Student Development</i>
2020-2023	Editorial Board Member, <i>Journal of First-Generation Student Success</i>
2017-2020	Editorial Board Member, <i>Journal of Student Affairs Research and Practice</i>
2014-2020	Editorial Board Member, <i>Journal of African American Males in Education</i>
2014-2016	Associate Editor, <i>College Student Affairs Journal</i>

Professional Service*American Association for Blacks in Higher Education*

2015	Member, Dissertation Awards Committee
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American College Personnel Association

2015-2017	Director of Research, Coalition for Lesbian, Gay, Bisexual, and Transgender Awareness (appointed)
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American Educational Research Association

2020-2022	Rural Education Special Interest Group, Chair of the Committee on Justice, Equity, Diversity, and Inclusion (invited)
2021-2022	Minority Dissertation Fellowship Committee, Selection Committee (appointed)
2019-2020	2020 Division J Conference Program Committee Member (invited)
2019-2020	Rural Education Special Interest Group, Nominating Committee (invited)
2013-2014	Division J Dissertation of the Year Committee, Member (appointed)

Ascendium Education Group

2021	Advisory Board Member for the National Postsecondary Rural Research Agenda (invited)
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Association for the Study of Higher Education

2020-2022	Awards Committee
2017-2018	2018 Conference Program Committee Member (invited)

Association of American Colleges and Universities

2022	Institutional Coach, Reframing Institute (invited)
2019	Meeting Thought Leader, Puerto Rico Project Kaleidoscope Regional Meetings (invited)

Interfaith Youth Core

2021-2022	Interfaith Diversity Experiences and Attitudes Longitudinal Survey (IDEALS) Race and Religion Research Collective (invited)
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Institute for Measurement Methodology in Rural STEM Education (IMMERSE)

2022-Present Rural Consultant Expert (invited)

Joan Ganz Cooney Center (the research and innovation lab of Sesame Workshop)

2020-2021 Research Advisory Board for By/With/For Youth: Inspiring Next Gen Media Audiences (invited)

National Academies of Sciences, Engineering, and Medicine

2023-Present Consensus Study Ad Hoc Committee on K-12 STEM Education and Workforce Development in Rural Areas (invited)

National Academy of Education

2021-Present National Academy of Education/Spencer Foundation Dissertation and Postdoctoral Fellowship Retreat Planning Committee (invited)

*National Rural Education Association*2023-Present Rural Researcher Representative, Executive Committee Member (elected)
2019-2022 Equity, Diversity, and Inclusion Committee (invited)*National Science Foundation*

2019-2020 Panel Reviewer, Improving Undergraduate Science Education (invited)

Promoting At-Promise Student Success (PASS) Project

2022, 2023 Advisory Board (invited)

Southern Association for College Student Affairs

2014-2016 Member, Executive Council Nominating Committee (appointed)

2013-2014 Member, *College Student Affairs Journal* Task Force (appointed)*Spencer Foundation*

2021 Participant in the Equity and Rural Education Convening (invited)

2019-2020 Panel Reviewer (invited)

Community Engagement and Outreach

2015-2019; 2021-24 Instructor, Elon Academy (college access and college success program)

2016-2018 Board Member, The College Factory (college access program)

2015-2017 Co-Chair of the Postsecondary Access and Career Strategic Action Team, Family Connections-Communities in Schools of Athens

SARAH RANNELLS POWELL

@utexas.edu

[Appointments](#)

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[Publications: Books or Book Chapters](#)

[Publications: Manuals](#)

[Publications: Other](#)

[Presentations: Conferences](#)

[Presentations: Invited](#)

[Presentations: States, Districts, and Schools](#)

[Professional Development](#)

[Service: National](#)

[Service: University](#)

[Service: Advising and Students](#)

[Service: Other](#)

[University Teaching](#)

[Awards](#)

[Media](#)

[Research Experience](#)

[Other Educational Experience](#)

[Affiliations](#)

APPOINTMENTS

Associate Professor, 2018-present

The University of Texas at Austin, College of Education, Austin, TX

Audrey Rogers Myers Centennial Professor in Education (2022-2023; 2023-2024)

Joe R. & Teresa Lozano Long Endowed Faculty Fellow (2020-2021)

Louise Spence Griffeth Fellowship for Excellence (2019-2020)

Assistant Professor, 2013-2018

The University of Texas at Austin, College of Education, Austin, TX

Assistant Professor, 2011-2013

University of Virginia, Curry School of Education, Charlottesville, VA

EDUCATION

Ph.D., Special Education, 2009

Vanderbilt University, Peabody College of Education & Human Development, Nashville, TN

M.Ed., School Administration, 2001

Vanderbilt University, Peabody College of Education & Human Development, Nashville, TN

B.A., Elementary Education, 1999

Centre College, Danville, KY

FUNDING

External funding is \$43,237,600 with \$21,693,768 as PI and \$21,453,832 as Co-PI

Fuka, K., Powell, S. R., & Roberts, G. (2023-2025). *StepWise virtual tutor for math word problems using SRSD*. Institute of Education Sciences, Small Business and Innovation Research (SBIR), 91990023C0032, \$1,000,000.

Stevens, E. A., Powell, S. R., & Leroux, A. (2023-2026). *Math words: Vocabulary support for students experiencing difficulty in mathematics*. Institute of Education Sciences, R324A230155, \$2,000,000.

Powell, S. R. & Henry, G. (2022-2023). *Intervention best practices: Network 5 (TIER)*. Texas Education Agency (\$1,700,000).

Lembke, E. S., Powell, S. R., Ketterlin-Geller, L., & Wiedermann, W. (2022-2025). *Supporting teaching of algebra with individual readiness (STAIR 2.0)*. Institute of Education Sciences, R324X220102 (\$2,999,991).

Ketterlin-Geller, L., Lembke, E. S., Powell, S. R., & Swanlund, A. (2022-2026). *Scalability, capacity, and learning engagement (SCALE) for Fraction Face-Off to accelerating mathematics learning of students experiencing mathematics difficulty*. U.S. Department of Education, Office of Elementary

and Secondary Education, Education Innovation and Research (EIR), Mid-Phase Grant, S411B210032 (\$7,996,477).

Powell, S. R., Berry, K. A., Roberts, G., Scammacca Lewis, N. & Fall, A-M. (2022-2025). *Math SPIRAL: Specialized instruction to reach all learners*. Institute of Education Sciences, R324X220024 (\$2,978,746).

Powell, S. R., Ketterlin-Geller, L., & Lembke, E. S. (2021-2026). *Leaders investigating mathematics evidence (LIME)*. U.S. Department of Education, Office of Special Education Programs, H325D210061 (\$3,685,176).

Powell, S. R. & Henry, G. (2021-2022). *Intervention best practices: Network 5 (TIER)*. Texas Education Agency (\$1,700,000).

Powell, S. R. (2020-2021). *Tiered interventions using evidenced-based research*. Texas Education Agency (\$1,696,748).

Powell, S. R., Doabler, C., Roberts, G., Scammacca Lewis, N. & Fall, A-M. (2020-2024). *The role of algebraic reasoning within additive and multiplicative multi-step problem solving for students with mathematics difficulty*. Institute of Education Sciences, R324A200176 (\$3,289,913).

Purpura, D., Schmitt, S., Hornburg, C., Powell, S., Andres-Salgarino, B., Duncan, R., Eason, S., Melzi, G., Ribner, A., Wilkey, E., & Miller-Cotto, D. (2020-2023). *My math stories: Taking my place in our mathematical world*. NewSchools Venture Fund – now AERDF (\$2,000,000).

Courey, S. & Powell, S. R. (2019-2024). *Young academic music and computational thinking for kindergarten*. U.S. Department of Education, Office of Innovation and Improvement, Education Innovation and Research (EIR), U411C190279 (\$1,493,857).

Powell, S. R. (2019-2020). *Intervention best practices: Network 5*. Texas Education Agency, 206600217110001 (\$1,990,556).

Powell, S. R. (2019-2020). *Faculty research assignment*. The University of Texas at Austin.

Powell, S. R. & Gordon, V. (2018-2019). *STEM majors reading STEM with preschoolers: Improving outcomes for all*. The University of Texas at Austin, Associate Professor Experimental (\$44,362.94).

Lembke, E. S., Ketterlin-Geller, L., & Powell, S. R. (2018-2021). *Project STAIR: Supporting teaching of algebra: Individual readiness*. U.S. Department of Education, Office of Special Education Programs, Model Demonstration, H326M170006 (\$1,567,541).

Powell, S. R. (2017-2018). *Developing connections between word problems and mathematical equations to promote word-problem performance among children with mathematics disability*. National Institutes of Health, Loan Repayment Program (\$9,901.71).

- Powell, S. R., & Vaughn, S. R. (2017-2022). *Developing, implementing, and evaluating interactive read-alouds for pre-kindergarten and kindergarten children in order to improve literacy and numeracy skills*. T. L. L. Temple Foundation (\$1,073,831).
- Doabler, C., Powell, S. R., Sampson, V. D., & Therrien, W. J. (2017-2021). *Promoting scientific explorers among students with learning disabilities: The design and testing of a grade 2 science program focused on Earth's systems*. National Science Foundation, DRK-12, 1720958 (\$2,485,966).
- Powell, S. R., & Barnes, M.A. (2015-2019). *Developing connections between word problems and mathematical equations to promote word-problem performance among students with mathematics difficulty*. Institute of Education Sciences, R324A150078 (\$3,460,978).
- Powell, S. R. (2015-2017). *Understanding the influence of math symbols and vocabulary on math performance*. National Institutes of Health, Loan Repayment Program (\$19,368.60).
- Powell, S. R. (2014-2017). *Investigating the effects of algebra and rational numbers performance on post-secondary preparation, access, and persistence for students with and without mathematics difficulty*. Greater Texas Foundation Faculty Fellowship (\$62,820 with \$24,999 match from the University of Texas at Austin).
- Powell, S. R. (2014-2016). *Understanding the influence of math symbols and vocabulary on math performance*. National Academy of Education/Spencer Postdoctoral Fellowship (\$55,000).
- Powell, S. R. (2015). *Mathematics trajectories from preschool to postsecondary*. Greater Texas Foundation (\$4,050).
- Powell, S. R. (2015). *Special research grant*. The University of Texas at Austin (\$750).
- Powell, S. R. (2014-2015). *Dean's fellowship*. The University of Texas at Austin (two course releases and \$3,000).
- Powell, S. R. (2014). *Big XII faculty fellowship*. The University of Texas at Austin (\$1,200).
- Powell, S. R. (2014). *The efficacy of vocabulary instruction embedded within mathematics tutoring*. The University of Texas at Austin, Summer Research Assignment (\$16,666.67).

PUBLICATIONS: JOURNALS

- Arsenault, T. L., & Powell, S. R. (in press). Intensifying language supports in word-problem schema instruction. *Teaching Exceptional Children*. <https://doi.org/10.1177/00400599211069555>
- At publication, Tessa Arsenault (Powell mentee) was a 2nd-year doctoral student at The University of Texas at Austin.

- Lin, X., & Powell, S. R. (in press). Development of a fraction vocabulary measure. *Assessment for Effective Intervention*. <https://doi.org/10.1177/15345084231202407>
- At publication, Xin Lin (Powell mentee) was a former doctoral student at The University of Texas at Austin.
 - This publication represents part of Xin Lin's dissertation project.
- Park, S., Stecker, P. M., & Powell, S. R. (in press). A teacher's toolkit for assessment when implementing data-based individualization in mathematics. *Intervention in School and Clinic*. <https://doi.org/10.1177/10534512231182042>
- Powell, S. R., Bos, S. E., King, S. G., Ketterlin-Geller, L., & Lembke, E. S. (in press). Using the data-based individualization framework within math intervention. *Teaching Exceptional Children*. <https://doi.org/10.1177/00400599221111114>
- At publication, Samantha Bos (Powell mentee) was a 4th-year doctoral student at The University of Texas at Austin.
 - At publication, Sarah King (Powell mentee) was a 3rd-year doctoral student at The University of Texas at Austin.
- Powell, S. R., MacLean, K. B., Carroll, M., Berry, K. A., Tran, L. M., King, S. G., & Leonard, E. (in press). SPIRAL: A professional learning and coaching model for educators who provided mathematics instruction to students experiencing mathematics difficulty. *School Science and Mathematics*.
100. Lariviere, D. O., Powell, S. R., & Akther, S. S. (2024). A synthesis of pre-algebraic reasoning interventions for students with mathematics difficulty in grade 6 through 8. *Learning Disabilities Research and Practice*, 39(1), 4–17. <https://doi.org/10.1177/09388982231222179>
- At publication, Danielle Lariviere (Powell mentee) was a 3rd-year doctoral student at The University of Texas at Austin.
 - At publication, Syeda Akther (Powell mentee) was a 3rd-year doctoral student at The University of Texas at Austin.
99. Rojo, M., Gersib, J. A., Powell, S. R., Shen, Z., King, S. G., Akther, S. S., Arsenault, T. L., Bos, S. E., Lariviere, D.P., & Lin, X. (2024). A meta-analysis of mathematics interventions: Examining the impacts of intervention characteristics. *Educational Psychology Review*, 36(9). <https://doi.org/10.1007/s10648-023-09843-0>
98. Arsenault, T. L., Powell, S. R., Hebert, M. A., King, S. G., Lin, X., & Lang, D. (2023). Mathematics writing profiles for students with mathematics difficulty. *Reading and Writing*, 36, 2025–2052. <https://doi.org/10.1007/s11145-022-10375-2>
- At publication, Tessa Arsenault (Powell mentee) was a 2nd-year doctoral student at The University of Texas at Austin.
 - At publication, Sarah King (Powell mentee) was a 3rd-year doctoral student at The University of Texas at Austin.
 - At publication, Xin Lin (Powell mentee) was a 4th-year doctoral student at The University of Texas at Austin.
 - At publication, Danika Lang was a doctoral student at the University of Nebraska—Lincoln.
97. Bos, S. E., Powell, S. R., Maddox, S. A., & Doabler, C. T. (2023). A synthesis of the conceptualization and measurement of implementation fidelity in mathematics intervention research. *Journal of Learning Disabilities*, 56(2), 95–115. <https://doi.org/10.1177/00222194211065498>
- At publication, Samantha Bos (Powell mentee) was a 4th-year doctoral student at The University of Texas at Austin.
 - At publication, Steven Maddox was a 4th-year doctoral student at The University of Texas at Austin.

96. King, S. G., & Powell, S. R. (2023). Language proficiency and the relation to word-problem performance in emergent bilingual students with mathematics difficulties. *Learning Disabilities Research and Practice*, 38(4), 263–273. <https://doi.org/10.1111/ldrp.12325>
 - At publication, Sarah King (Powell mentee) was a 4th-year doctoral student at The University of Texas at Austin.
95. Lin, X., & Powell, S. R. (2023). Exploring academic and cognitive skills impacting retention and acquisition of word-problem skills gained during or after intervention. *Child Development*, 94(6), e362–e376. <https://doi.org/10.1111/cdev.13970>
 - At publication, Xin Lin (Powell mentee) was a former doctoral student at The University of Texas at Austin.
94. Lin, X., & Powell, S. R. (2023). Exploring the impacts of linguistics, working memory, age, and gender on the quantity-number competencies model. *Early Childhood Research Quarterly*, 63, 85–97. <https://doi.org/10.1016/j.ecresq.2022.12.003>
 - At publication, Xin Lin (Powell mentee) was a 4th-year doctoral student at The University of Texas at Austin.
93. Lin, X., & Powell, S. R. (2023). Initial efficacy of a fraction vocabulary intervention for students experiencing mathematics difficulty in Grade 4. *Learning Disabilities Research and Practice*, 38(4), 253–262. <https://doi.org/10.1111/ldrp.12321>
 - At publication, Xin Lin (Powell mentee) was a former doctoral student at The University of Texas at Austin.
 - This publication represents Xin Lin’s dissertation project.
92. Powell, S. R., Akther, S. S., Yoon, N. Y., Berry, K. A., Nemcek, C., Fall, A.-M., & Roberts, G. (2023). The effect of addition and subtraction practice within word-problem intervention on addition and subtraction outcomes. *Learning Disabilities Research and Practice*, 38(3) 182–198. <https://doi.org/10.1111/ldrp.12319>
 - At publication, Syeda Sharjina Akther (Powell mentee) was a 2nd-year doctoral student at The University of Texas at Austin.
 - At publication, Na Young Yoon was a 2nd-year doctoral student at The University of Texas at Austin.
91. Powell, S. R., Bouck, E. C., Sutherland, M., Clarke, B., Arsenault, T. L., & Freeman-Green, S. (2023). Essential components for math instruction. *Teaching Exceptional Children*, 56(1), 14–24. <https://doi.org/10.1177/00400599221125892>
 - At publication, Tessa Arsenault (Powell mentee) was a 2nd-year doctoral student at The University of Texas at Austin.
90. Arsenault, T. L., & Powell, S. R. (2022). Word-problem performance differences by schema: An analysis of students with and without mathematics difficulty. *Learning Disabilities Research and Practice*, 37(1), 37–50. <https://doi.org/10.1111/ldrp.12273> (EJ1326906)
 - At publication, Tessa Arsenault (Powell mentee) was a 2nd-year doctoral student at The University of Texas at Austin.
89. Lin, X., & Powell, S. R. (2022). The roles of initial mathematics, reading, and cognitive skills in subsequent mathematics performance: A meta-analytic structural equation modeling approach. *Review of Educational Research*, 92(2), 288–325. <https://doi.org/10.3102/00346543211054576>
 - At publication, Xin Lin (Powell mentee) was a 4th-year doctoral student at The University of Texas at Austin.
88. Myers, J. A., Witzel, B. S., Powell, S. R., Li, H., Pigott, T., Xin, Y. P., & Hughes, E. M. (2022). A meta-analysis of mathematics word-problem solving interventions for elementary students who

evidence mathematics difficulties. *Review of Educational Research*, 92(5), 695–742.
<https://doi.org/10.3102/00346543211070049>

87. Nelson, G., Cook, S. C., Zarate, K., Drake, K. R., Powell, S. R., Maggin, D. M., Kiss, A. J., Ford, J. W., Sun, L., & Espinas, D. R. (2022). A systematic review of meta-analyses in special education: Exploring the evidence base for high-leverage practices. *Remedial and Special Education*, 43(5), 344–358.
<https://doi.org/10.1177/07419325211063491>
 - At publication, Kary Zarate was a 4th-year doctoral student at the University of Illinois, Chicago.
 - At publication, Daniel Espinas was a 3rd-year doctoral student at Vanderbilt University.
86. Powell, S. R., Benz, S. A., Mason, E. N., & Lembke, E. S. (2022). How to structure and intensify mathematics intervention. *Beyond Behavior*, 31(5), 5–15.
<https://doi.org/10.1177/10742956211072267>
85. Powell, S. R., Berry, K. A., Acunto, A. N., Fall, A.-M., & Roberts, G. (2022). Applying an individual word-problem intervention to a small-group setting: A pilot study's evidence of improved word-problem performance for students experiencing mathematics difficulty. *Journal of Learning Disabilities*, 55(5), 359–374. <https://doi.org/10.1177/00222194211047635>
 - At publication, Ana Acunto was a Master's student at The University of Texas at Austin.
84. Powell, S. R., Berry, K. A., Fall, A.-M., Roberts, G., Barnes, M. A., Fuchs, L. S., Martinez-Lincoln, A., Forsyth, S. R., Vinsonhaler, R. K., Benz, S. A., Zapparoli, B., & Lin, X. (2022). Does word-problem performance maintain? Follow-up one year after implementation of a word-problem intervention. *Journal of Research on Educational Effectiveness*, 15(1), 52–77.
<https://doi.org/10.1080/19345747.2021.1961332> (EJ1328218)
 - At publication, Amanda Martinez-Lincoln, Suzanne Forsyth (Powell mentee), Rebecca Vinsonhaler, Sarah Benz (Powell mentee), Brenda Zapparoli (Powell mentee), and Xin Lin (Powell mentee) were doctoral students at The University of Texas at Austin.
83. Powell, S. R., Namkung, J. M., & Lin, X. (2022). An investigation of using keywords to solve word problems. *The Elementary School Journal*, 122(3), 452–473. <https://doi.org/10.1086/717888> (EJ1329642)
 - At publication, Xin Lin (Powell mentee) was a 3rd-year doctoral student at The University of Texas at Austin.
82. Powell, S. R., Urrutia, V. Y., Berry, K. A., & Barnes, M. A. (2022). The word-problem solving and explanations of students experiencing mathematics difficulty: A comparison based on dual-language status. *Learning Disability Quarterly*, 45(1), 6–18.
<https://doi.org/10.1177/0731948720922198> (ED618061)
 - At publication, Vanessa Urrutia was a Master's student at The University of Texas at Austin.
81. Stevens, E. A., Forsyth, S. R., & Powell, S. R. (2022). Examining problem-solving schemas and schema features in children's trade books. *The Elementary School Journal*, 123(2), 318–343.
<https://doi.org/10.1086/721769>

80. Benz, S. A., & Powell, S. R. (2021). The influence of behavior on performance within a word-problem intervention for students with mathematics difficulty. *Remedial and Special Education*, 42(3), 182–192. <https://doi.org/10.1177/0741932520923063> (EJ1295309)
- At publication, Sarah Benz (Powell mentee) was a 3rd-year doctoral student at The University of Texas at Austin.
 - This publication represents Sarah Benz's dissertation project.
79. Blumenthal, Y., Blumenthal, S., Lembke, E. S., Powell, S. R., Schultze-Petzold, P., & Thomas, E. R. (2021). Educator perspectives on data-based decision making in Germany and the United States. *Journal of Learning Disabilities*, 54(4), 284–299. <https://doi.org/10.1177/0022219420986120>
- At publication, Elizabeth Thomas was a 3rd-year doctoral student at University of Missouri.
78. Doabler, C. T., Therrien, W. J., Longhi, M., Roberts, G., Hess, K. E., Maddox, S. A., Uy, J., Lovette, G., Fall, A.-M., Kimmel, G., Benson, S., VanUitert, V. J., Emily, S. E., Powell, S. R., Sampson, V., & Toprac, P. (2021). Efficacy of a second-grade science program: Increasing science outcomes for all students. *Remedial and Special Education*, 42(3), 140–154. <https://doi.org/10.1177/0741932521989091>
77. Lin, X., & Powell, S. R. (2021). Examining the relation between whole-number and fractions: A meta-analytic structural equation modeling approach. *Contemporary Educational Psychology*, 67, 102017. <https://doi.org/10.1016/j.cedpsych.2021.102017>
- At publication, Xin Lin (Powell mentee) was a 3rd-year doctoral student at The University of Texas at Austin.
76. Nurnberger-Haag, J., Alexander, A. N., & Powell, S. R. (2021). What counts in number books? A content-domain specific typology to evaluate children's books for mathematics. *Mathematical Thinking and Learning*, 23(2), 145–169. <https://doi.org/10.1080/10986065.2020.1777365>
- At publication, Anita Alexander was a doctoral student at Kent State University.
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 - At publication, Tiffini Pruitt-Britton was a doctoral student at Southern Methodist University.

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- Fuchs, L. S., Seethaler, P. M., Powell, S. R., Zumeta Edmonds, R., & Fuchs, D. (in press). Improving arithmetic, word-problem, and fractions performance in students with mathematics disabilities. In J. M. Kauffman, D. P. Hallahan, & P. C. Pullen (Eds.), *Handbook of Special Education* (3rd ed.). Routledge.
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 - At publication, Samantha Bos (Powell mentee) and Xin Lin were 3rd-year doctoral students at The University of Texas at Austin.
12. Powell, S. R., Forsyth, S. R., & Driver, M. K. (2021). Improving conceptual understanding and procedural fluency with number combinations and computation. In D. P. Bryant (Ed.), *Intensifying mathematics interventions for struggling students* (pp. 98–120). Guilford Press.
11. Powell, S. R., Driver, M. K., Forsyth, S. R., Bos, S. A., & Benz, S. A. (2020). *Working with exceptional students: An introduction to special education* (2nd ed). Zovio.
 - At publication, Samantha Bos (Powell mentee) was a 2nd-year doctoral student at The University of Texas at Austin.
10. Ketterlin-Geller, L., R., Powell, S. R., Chard, D. J., & Perry, L. (2019). *Teaching math in middle school: Using MTSS to meet all students' needs*. Brookes Publishing.
9. Powell, S. R., Benz, S. A., & Forsyth, S. R. (2018). Supporting the mathematics learning of elementary students within a multi-level framework. In P. C. Pullen & M. J. Kennedy (Eds.), *Handbook of response to intervention and multi-tiered systems of support* (pp. 233–248). Routledge.
 - At publication, Sarah Benz (Powell mentee) was a 3rd-year doctoral student at The University of Texas at Austin.
8. Fuchs, L. S., Malone, A. M., Seethaler, P. M., Powell, S. R., & Fuchs, D. (2017). Intervention to improve arithmetic, word-problem, and fraction performance in students with mathematics disabilities. In J. M. Kauffman, D. P. Hallahan, & P. C. Pullen (Eds.), *Handbook of special education, second edition* (pp. 558–570). Routledge.
7. Powell, S. R., & Zumeta Edmonds, R. (2017). Mathematics assessment for students with diverse learning needs. In M. T. Hughes & E. Talbott (Eds.), *The Wiley handbook of diversity in special education* (pp. 379–398). John Wiley & Sons.
6. Casa, T. M., Firmender, J. M., Cahill, J., Cardetti, F., Choppin, J. M., Cohen, J., Cole, S., Colonnese, M. W., Copley, J., DiCicco, M., Dieckmann, J., Dori, J., Gavin, M. K., Hebert, M. A., Karp, K. S., LaBella, E., Moschkovich, J. N., Moylan, K., Olinghouse, N. G., Powell, S. R., Price, E., Pugalee, D. K., Fulwiler, B. R., Sheffield, L. J., & Zawodniak, R. (2016). *Types of and purposes for elementary mathematical writing: Task force recommendations*. University of Connecticut.
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5. Lembke, E. S., Strickland, T. K., & Powell, S. R. (2016). Monitoring student progress to determine instructional effectiveness. In B. S. Witzel (Ed.), *Bridging the gap between arithmetic and algebra* (pp. 139–155). Council for Exceptional Children.
4. Powell, S. R., & Witzel, B. S. (2016). Progressions that lead to algebraic success. In B. S. Witzel (Ed.), *Bridging the gap between arithmetic and algebra* (pp. 69–82). Council for Exceptional Children.
3. Powell, S. R., & Fuchs, L. S. (2015). Peer-Assisted Learning Strategies in mathematics. In K. R. Harris & L. Meltzer (Eds.), *The power of peers: Enhancing learning and social skills* (pp. 188–223). Guilford Press.
2. Powell, S. R., & Driver, M. K. (2013). *Working with exceptional students: An introduction to special education*. Bridgepoint Education.
 - At publication, Melissa Driver (Powell mentee) was a 2nd-year doctoral student at University of Virginia.
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PUBLICATIONS: MANUALS

6. Powell, S. R., & Berry, K. A. (2020). *Pirate Math Equation Quest*.
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5. Fuchs, L. S., Powell, S. R., & Fuchs, D. (n.d.) *Math Wise: Whole-class instruction at second grade*. Nashville, TN: Vanderbilt University.
4. Fuchs, L. S., Fuchs, D., Yazdian, L., Powell, S., & Karns, K. (n.d.). *Peer-Assisted Learning Strategies: Kindergarten Math*. Nashville, TN: Vanderbilt University.
3. Fuchs, L. S., Fuchs, D., Yazdian, L., Powell, S., & Karns, K. (n.d.). *Peer-Assisted Learning Strategies: First Grade Math*. Nashville, TN: Vanderbilt University.
2. Fuchs, L. S., Seethaler, P. M., Powell, S. R., & Fuchs, D. (n.d.) *Pirate Math: Let's find X*. Nashville, TN: Vanderbilt University.
1. Fuchs, L. S., Powell, S. R., Seethaler, P. M., Schumacher, R. F., & Fuchs, D. (n.d.) *Pirate Math: Whole-class instruction at second grade*. Nashville, TN: Vanderbilt University.

PUBLICATIONS: OTHER

10. Powell, S. R., King, S. G., & Benz, S. A. (2023). *Maths practices you can count on: Five research-validated practices in mathematics*. Centre for Independent Studies.

<https://www.cis.org.au/publication/maths-practices-you-can-count-on-five-research-validated-practices-in-mathematics/>

9. Powell, S. R., Hughes, E. M., & Peltier, C. (2022). *Myths that undermine maths teaching*. Centre for Independent Studies. <https://www.cis.org.au/publication/myths-that-undermine-maths-teaching/>
8. Nelson, G., Cook, S., Powell, S. R., Maggin, D. M., & Zarate, K. (2021). *Instructional practice briefs*. Progress Center, American Institutes of Research. <https://promotingprogress.org/resources/instructional-briefs>
7. Berry, K. A., & Powell, S. R. (2021). *Pirate Math Equation Quest*. State of Rhode Island.
6. Powell, S. R., & Berry, K. A. (2021). *Inclusion in Texas network: Instructional routines for mathematics intervention*. Education Service Center 20. https://www.inclusionintexas.org/apps/pages/index.jsp?uREC_ID=2155039&type=d&pREC_ID=2169859
5. Berry, K. A., & Powell, S. R. (2020). *Evidence-based specially designed instruction in mathematics: Resource guide*. Commonwealth of Virginia Department of Education. http://www.doe.virginia.gov/special_ed/disabilities/learning_disability/swd-mathematics-resources.pdf
4. Berry, K. A., & Powell, S. R. (2020). *Students with disabilities in mathematics: Frequently asked questions*. Commonwealth of Virginia Department of Education. http://www.doe.virginia.gov/special_ed/disabilities/learning_disability/swd-mathematics-faq.pdf
3. Powell, S. R., & Berry, K. A. (2019). Word problems? No problem! Helping students to set up and solve word problems. *New Times for DLD*, 37(2), 1–5.
2. Bryant, D. P., & Powell, S. R. (2017). What solid research tells us about teaching math. *Texas Lone Star*, 35(5), 14–17. http://www.texaslonestaronline.org/texaslonestar/june_2017?pg=14#pg14
1. Powell, S. R., & Nelson, G. (2016). Trajectories of mathematics performance: From preschool to postsecondary. <http://www.greatertexasfoundation.org/wp-content/uploads/2016/02/MathBriefJan2016v2.pdf>

PRESENTATIONS: CONFERENCES

- Berry, K. A., Powell, S. R., Arsenault, T. L., Lariviere, D. O., Hardy, A. M., & Perkins, S. D. (2024, April). *Creating educational opportunities for all: Strategies for improving multi-step problem-solving skills of elementary students*. Presentation accepted at the American Education Research Association Annual Meeting, Philadelphia, PA.

- Ketterlin-Geller, L. R., Powell, S. R., & Lembke, E. S. (2024, April). *Improving fraction outcomes for students with math difficulty: Outcomes from an efficacy replication trial*. Presentation accepted at the American Educational Research Association Annual Meeting, Philadelphia, PA.
- MacLean, K. B., Berry, K. A., Carroll, M., & Powell, S. R. (2024, April). *SPecialized instruction to reach all learners (SPIRAL) professional learning-coaching model: Improvements in teacher instructional practices*. Roundtable accepted at the American Educational Research Association Annual Meeting, Philadelphia, PA.
- King, S., Powell, S. R., & Mason, K. (2024, March). *STAIRs to Success with DBI: Leveraging Collaborative School Partnerships*. Presentation accepted at Council for Exceptional Children Convention and Expo, San Antonio, TX.
- Moore, C., & Powell, S. R. (2024, March). *How to use children's books to increase early math knowledge*. Research-to-Practice Deep Dive session accepted at Council for Exceptional Children Convention and Expo, San Antonio, TX.
- Powell, S. R. (2024, March). *What's important in mathematics at Tier 2 and 3*. Workshop accepted at Council for Exceptional Children Convention and Expo, San Antonio, TX.
- Powell, S. R. (2024, March). *Teaching word problems? Include addition and subtraction practice*. Presentation accepted at Council for Exceptional Children Convention and Expo, San Antonio, TX.
- Powell, S. R., Conroy, K., Padilla, D., Perneti, M., & Vander Tuin, M. (2024, March). *SPIRALing up! Helping math teachers provide effective math tutoring*. Poster accepted at Council for Exceptional Children Convention and Expo, San Antonio, TX.
191. Clarke, B., Lembke, E., Powell, S. R., & Clemens, N. (2024, February). *Eliciting best performance in academics: Top evidence-based interventions* [Poster presentation]. National Association of School Psychologists, New Orleans, LA.
190. Powell, S. R., van Dijk, W., Al Otaiba, S., Hebert, M. A., Lembke, E. S., & Ketterlin-Geller, L. (2024, February). *Let's talk teachers! Can professional development and coaching impact student outcomes?* [Presentation]. Pacific Coast Research Conference, San Diego, CA.
189. Agrawal, V., Miller, A. H., Barnes, M. A., & Powell, S. R. (2024, February 1). *Worked problem accuracy in 3rd grade students with mathematics difficulty* [Poster presentation]. Pacific Coast Research Conference, San Diego, CA.
188. Agrawal, V., Miller, A. H., Kepiro, H., Barnes, M. A. & Powell, S. R. (2024, January 12). *Psychometrics of a researcher-made worked examples assessment for word problem solving* [Poster presentation]. Southeastern STEM Education Research Conference, Murfreesboro, TN, USA.

187. Powell, S. R., Brafford, T., Mao, J., & Shen, Z. (2023, October 26). *Enhancing the math experience for exceptional learners: Essentials for instruction*. Presentation presented at the National Council of Teachers of Mathematics Annual Meeting and Exposition, Washington, DC.
186. Capin, P., Weber-Mayrer, M., Ottley, J., Powell, S., Hessler, T., Hunger, M. H., Teeple, K., & Brobeck, D. (2023, October 12). *A statewide initiative to implement evidence-based, high-dosage tutoring in Ohio*. Presentation presented at the International Dyslexia Association Conference, Columbus, OH.
185. Hornburg, C. B., Mayes, A. S., McElveen, T. L., Powell, S. R., Melzi, G., Prishker, N., Asad, N., Valdivia, I., Andres-Salgarino, M. B., Tran, L. M., Eiland, M. D., Eason, S. H., Schmitt, S. A., & Purpura, D. J. (2023, October). *The development of storybooks supporting elementary students' math identify, executive function, and word problem solving*. Poster presented at Psychology of Mathematics Education – North America Annual Conference, Reno, NV.
184. Hardy, A., Powell, S. R., Berry, K. A., Arsenault, T. L., Akther, S. S., Lariviere, D. O., & Mao, J. (2023, September). *Initial results from an efficacy trial about multi-step word-problem solving*. Presentation presented at the Society for Research on Educational Effectiveness, Washington, DC.
183. Lembke, E., Powell, S. R., & Ketterlin-Geller, L. (2023, July). *Supporting teaching of algebra individual readiness (STAIR): What we learned and what's next*. Presentation presented at Office of Special Education Programs Leadership and Project Directors' Conference, Washington, DC.
182. Arsenault, T., Hardy, A., Akther, S. S., & Powell, S. R. (2023, June). *Grade 4 multi-step word-problem intervention*. Presentation presented at Mathematical Cognition and Learning Society, Loughborough, England.
181. Arsenault, T., & Powell, S. R. (2023, June). *Identification of word-problem difficulty: Measuring the psychometric properties of an additive word-problem screener*. Presentation presented at Mathematical Cognition and Learning Society, Loughborough, England.
180. King, S. G., & Powell, S. R. (2023, June). *From research to practice: Implementation of data-based individualization*. Presentation presented at Mathematical Cognition and Learning Society, Loughborough, England.
179. Mann, M., Arsenault, T. L., & Powell, S. R. (2023, June). *The significance of symbolic gestures and pointing usage in early childhood mathematics instruction*. Poster presented at Mathematical Cognition and Learning Society, Loughborough, England.
178. Mayes, A., Hornburg, C. B., McElveen, T. L., Schmitt, S. A., Andres-Salgarino, B., Powell, S. R., & Purpura, D. (2023, June). *Our mathematical world*. Presentation presented at Mathematical Cognition and Learning Society, Loughborough, England.

177. McElveen, T. L., Powell, S. R., Hornberg, C., Mayes, A., Kim, J., Quinn, K., Schmitt, S., Eiland, M., Andres-Salgarino, M. B., & Purpura, D. (2023, June). *Using PULSE to improve problem solving with the four operations*. Presentation presented at Mathematical Cognition and Learning Society, Loughborough, England.
176. Powell, S. R., Brafford, T., & King, S. G. (2023, June). *School-based research with teachers: Implementation of evidence-based practices*. Presentation presented at Mathematical Cognition and Learning Society, Loughborough, England.
175. Brafford, T., Powell, S. R., & Hughes, E. M. (2023, April). *Middle-school students' performance on a mathematics vocabulary measure across grade levels and dual-language learner populations*. Poster accepted at American Education Research Association Annual Meeting, Chicago, IL.
174. Lembke, E. S., Ketterlin-Geller, L., Powell, S. R., & Hopkins, S. (2023, April). *Supporting teaching of algebra: Individual readiness*. Roundtable presented at American Education Research Association Annual Meeting, Chicago, IL.
173. McElveen, T. L., Hornburg, C. B., Mayes, A. S., Miller-Cotto, D., Andres-Salgarino, M. B., Schmitt, S. A., Powell, S. R., & Purpura, D. J. (2023, March). *Associations between communal socialization and the math identity and performance of minoritized elementary students*. Symposium presented at the annual meeting of the Society of Research in Child Development, Salt Lake City, Utah.
172. Berry, K. A., Powell, S. R., Arsenault, T. L., Lariviere, D. O., Perkins, S. D., & Akther, S. S. (2023, March). *Multi-step? Don't fret. Tier-2 strategies for solving multi-step word problems*. Presentation presented at Council for Exceptional Children Convention and Expo, Louisville, KY.
171. Brafford, T., Powell, S. R., & Hughes, E. M. (2023, March). *Differential performance of middle-school students on a mathematics vocabulary measure*. Poster presented at Council for Exceptional Children Convention and Expo, Louisville, KY.
170. Lembke, E. S., Ketterlin-Geller, L., & Powell, S. R. (2023, March). *What we learned: improving algebra readiness through Project STAIR*. Presentation presented at Council for Exceptional Children Convention and Expo, Louisville, KY.
169. Hayes, L., Lembke, E., & Powell, S. R. (2023, March). *Integrating intensive intervention content within teacher education courses*. Presentation presented at Council for Exceptional Children Convention and Expo, Louisville, KY.
168. Park, S., Stecker, P., & Powell, S. R. (2023, March). *Data-based individualization for students with mathematics difficulties: a teacher's guide*. Poster presented at Council for Exceptional Children Convention and Expo, Louisville, KY.

167. Powell, S. R. (2023, March). *Don't use key words to solve math word problems*. Presentation accepted at Council for Exceptional Children Convention and Expo, Louisville, KY.
166. Powell, S. R., Tran, L. M., Carroll, M., & Berry, K. A. (2023, March). *Essentials for math intervention: Focus on word problems and manipulatives*. Poster presented at Council for Exceptional Children Convention and Expo, Louisville, KY.
165. Powell, S. R., Purpura, D., Moore, C., Stevens, E., & Hughes, E. (2023, February). *The intersection of language and mathematics*. Panel presented at Pacific Coast Research Conference, San Diego, CA.
164. Powell, S. R. (2022, October). *Word problems? No problem*. Presented at the Learning Disabilities Association of Canada, virtual conference.
163. Ketterlin-Geller, L. R., Lembke, E., & Powell, S. R. (2022, October). *Accelerating learning for all middle school students: Using data to individualize instruction*. Presented at the 2022 Inspire Conference for the North Texas Council of Teachers of Mathematics, Arlington, TX.
162. Powell, S. R. (2022, September). *Replication of a preschool mathematics read-alouds program in kindergarten*. Presentation presented at the Society for Research on Educational Effectiveness, Washington, DC.
161. Powell, S. R. (2022, September). *Teaching early math by providing language exploration*. Presentation presented at the Society for Research on Educational Effectiveness, Washington, DC.
160. Powell, S. R. (2022, September). *Word problems? No problem! Effective strategies for teaching math word-problem solving*. Presentation presented at Australian Association of Special Education National Conference, Sydney, Australia.
159. Arsenault, T.L., King, S. A., Powell, S. R., Hebert, M. A., & Lin, X. (2022, June). *Mathematics writing profiles for students with mathematics difficulty*. Poster presented at the Mathematical Cognition and Learning Society Conference, Antwerp, Belgium.
158. Berry, K. A., Powell, S. R., Arsenault, T. L., & Perkins, S. D. (2022, April). *Word problem problems? 5 strategies for improving problem-solving skills of Tier-2 students*. Roundtable presented at the American Education Research Association Annual Meeting, Chicago, IL.
157. Powell, S. R., & Arsenault, T. L. (2022, April). *Differences in word-problem solving based on item characteristics*. Presentation presented at the Mathematical Cognition and Learning Society, virtual conference.

156. Powell, S. R. (2022, February). *Does word-problem performance maintain?* Presentation presented at Pacific Coast Research Conference, San Diego, CA.
155. Berry, K. A., & Powell, S. R. (2022, February). *Word problems? No problem. Effective problem-solving instruction for students with learning difficulties.* Workshop presented at Council for Exceptional Children Convention and Expo, Orlando, FL.
154. Lembke, E. S., Powell, S. R., & Ketterlin-Geller, L. (2022, February). *Strengthening algebraic readiness: professional development in data-based individualization.* Workshop presented at Council for Exceptional Children Convention and Expo, Orlando, FL.
153. Berry, K. A., & Powell, S. R. (2022, January). *Word-problem wizards: 5 strategies for improving tier-2 students' problem-solving skills.* Presentation presented at the Council for Exceptional Children Convention and Expo, Orlando, FL.
152. Hwang, J., Arsenault, T. L., Lembke, E. S., Powell, S. R., & Ketterlin-Geller, L. R. (2022, January). *Better instruction through assessment in middle school mathematics.* Poster presented at the Council for Exceptional Children Convention and Expo, Orlando, FL.
151. Lemons, C. J., Powell, S. R., & Lane, K. L. (2022, January). *Previewing the new handbook of special education research: Innovations and future research.* Presentation presented at the Council for Exceptional Children Convention and Expo, Orlando, FL.
150. Myers, J., Witzel, B., & Powell, S. R. (2022, January). *What's essential to include in word-problem intervention in the elementary grades.* Poster presented at the Council for Exceptional Children Convention and Expo, Orlando, FL.
149. Powell, S. R., Arsenault, T. L., Bos, S. E., Lin, X., & Shen, Z. (2022, January). *Designing your instructional platform for math intervention.* Poster presented at the Council for Exceptional Children Convention and Expo, Orlando, FL.
148. Powell, S. R., Bos, S. E., Juergensen, R., Lembke, E., & Ketterlin-Geller, L. (2022, January). *How to design and adapt your middle school math instruction.* Presentation presented at the Council for Exceptional Children Convention and Expo, Orlando, FL.
147. Powell, S. R., & Hughes, E. M. (2022, January). *Introducing the Science of Math: A movement to promote evidence-based math instruction.* Poster presented at the Council for Exceptional Children Convention and Expo, Orlando, FL.
146. Powell, S. R., Riccomini, P., Al Otaiba, S., & Solari, E. (2022, January). *What is the science of reading and the science of math?* Presentation presented at the Council for Exceptional Children Convention and Expo, Orlando, FL.

145. Tran, L. M., & Powell, S. R. (2022, January). *Top 5 tips for designing math interventions*. Poster accepted at the Council for Exceptional Children Convention and Expo, Orlando, FL.
144. Powell, S. R., Fuchs, L. S., & Seethaler, P. M. (2021, November). *Beyond the basics: Important components of word-problem interventions*. Mathematical Cognition and Learning Society, virtual conference.
143. Smith, E., Smith, R. A., Powell, S. R., & Hebert, M. (2021, October). *Examining the value, importance, self-efficacy, and prior experiences of mathematics writing for preservice teachers*. Psychology of Mathematics Education – North America (PME-NA), virtual conference.
142. Powell, S. R. (2021, September). *Do word-problem effects maintain?* Poster presented at the Society for Research on Educational Effectiveness Conference, virtual conference.
141. Powell, S. R., & Arsenault, T. L. (2021, August). *Word-problem performance differences by schema: An analysis of students with and without mathematics difficulty*. Poster presented at European Associate for Research on Learning and Instruction, virtual conference.
140. Berry, K. A., & Powell, S. R. (2021, April). *Do word-problem skills maintain after intervention: A 1-year follow-up of students with mathematics difficulty*. Paper presented at the American Education Research Association Annual Meeting, virtual conference.
139. Marx, T., & Powell, S. R. (2021, April). *Closing math achievement gaps for students with learning differences through intensive intervention*. Presentation presented at National Council of Teachers of Mathematics National Conference and Exposition, virtual conference.
138. Powell, S. R., & Berry, K. A. (2021, April). *Don't leave pre-algebraic reasoning out of word-problem intervention*. Presentation presented at National Council of Teachers of Mathematics National Conference and Exposition, virtual conference.
137. Powell, S. R., Lembke E. S., & Ketterlin-Geller, L. (2021, April). *Supporting middle school students who experience difficulty with mathematics*. Presentation accepted at National Council of Teachers of Mathematics National Conference and Exposition, virtual conference.
136. Berry, K. A., & Powell, S. R. (2021, March). *Word problems? No problem! Effective problem-solving instruction for students with learning difficulties*. Workshop accepted at Council for Exceptional Children Convention and Expo.
135. Berry, K. A., Powell, S. R., Acunto, A. N., & Zapparolli, B. L. (2021, March). *How to help Tier 2 students solve math word problems*. Video presentation at the Council for Exceptional Children Convention and Expo, virtual conference.
134. Espinas, D., Cook, S., Zarate, K., Maggin, D., Ford, J., Nelson, G., & Powell, S. R. (2021, March). *The evidence-base of the CEC's high-leverage practices in special education*. Video presentation at the Council for Exceptional Children Convention and Expo, virtual conference.

133. Forsyth, S. R., & Powell, S. R. (2021, March). *Engaging families of at-risk children: Using children's storybooks to teach math at home*. Video presentation at the Council for Exceptional Children Convention and Expo, virtual conference.
132. Hayes, L., Powell, S. R., & Lembke, E. S. (2021, March). *Preparing educators to support struggling students: Online course resources for intensive intervention*. Video presentation at the Council for Exceptional Children Convention and Expo, virtual conference.
131. Powell, S. R., Lembke, E. S., & Ketterlin-Geller, L. (2021, March). *Data-based individualization in middle school for students experiencing math difficulty*. Video presentation at the Council for Exceptional Children Convention and Expo, virtual conference.
130. Powell, S. R., Seethaler, P. M., & Fuchs, L. S. (2021, March). *Essential components for teaching students to solve word problems*. Video presentation at the Council for Exceptional Children Convention and Expo, virtual conference.
129. Shin, M., & Powell, S. R. (2021, March). *Different examples of word-problem instruction for students with learning disabilities*. Video presentation at the Council for Exceptional Children Convention and Expo, virtual conference.
128. Tran, L., & Powell, S. R. (2021, March). *What to teach? Math intervention strategies every new teacher should know*. Video presentation at the Council for Exceptional Children Convention and Expo, virtual conference.
127. Lembke, E. S., Zumeta Edmonds, R., Powell, S. R., & Ketterlin-Geller, L. (2021, February). *Meeting the needs of students in middle-school mathematics: Professional development in data-based individualization*. Presentation presented at Pacific Coast Research Conference, virtual conference.
126. Powell, S. R. (2021, February). *Do word problem effects maintain after intervention?* Poster presented at Pacific Coast Research Conference, virtual conference.
125. Forsyth, S. R., & Powell, S. R. (2021, January). *Treasured tales – using stories to teach early math language and concepts*. Presentation presented at the Division for Early Childhood Annual International Conference on Young Children, virtual conference. ($n = 28$)
124. Powell, S. R. (2020, October). *Caregivers using mathematics-focused read-alouds with their children*. Poster presented at the Home Math Environment Conference, virtual conference.
123. Berry, K. A., & Powell, S. R. (2020, April). *The impact of small-group word-problem intervention for third-grade students with mathematics difficulty*. Roundtable accepted at American Educational Research Association Annual Meeting, San Francisco, CA.

122. Lembke, E. S., Ketterlin-Geller, L., Powell, S. R., & Smith, A. (2020, April). *Improving teachers' mathematics instruction for middle school students at-risk/with disabilities: Collaboration to support algebraic readiness*. Roundtable accepted at American Educational Research Association Annual Meeting, San Francisco, CA.
121. Powell, S. R., Adams, E., Ketterlin-Geller, L., Namkung, J. M., Satsangi, R., & Watt, S. (2020, February). *Greater than X: The latest and greatest algebraic reasoning research*. Panel presented at Pacific Coast Research Conference, San Diego, CA.
120. Berry, K. A. & Powell, S. R. (2020, February). *Performance differences on mathematics vocabulary for English learners and non-English learners*. Presentation presented at Council for Exceptional Children Convention and Expo, Portland, OR. ($n = 17$)
119. Forsyth, S. R., & Powell, S. R. (2020, February). *A jump start for kindergarten: Providing opportunities to explore math language*. Presentation presented at Council for Exceptional Children Convention and Expo, Portland, OR. ($n = 15$)
118. Powell, S. R., & Berry, K. A. (2020, February). *Improving elementary students' word-problem solving: Teach students to use equations!* Presentation presented at Council for Exceptional Children Convention and Expo, Portland, OR. ($n = 21$)
117. Powell, S. R., Ketterlin-Geller, L., & Lembke, E. (2020, February). *Using data to improve the math outcomes for middle school students*. Presentation accepted at Council for Exceptional Children Convention and Expo, Portland, OR. ($n = 30$)
116. Zumeta Edmonds, R., Bailey, T., & Powell, S. R. (2020, February). *Count me in: Resources for intensifying mathematics intervention for students who struggle*. Multi-presentation session presented at Council for Exceptional Children Convention and Expo, Portland, OR. ($n = 35$)
115. Powell, S. R. (2020, January). *Algebraic reasoning within word-problem solving*. Paper presented at the Institute of Education Sciences Principal Investigator's Meeting, Washington, DC. ($n = 12$)
114. Powell, S. R., Berry, K. A., & Barnes, M. A. (2020, January). *Developing connections between word problems and mathematical equations*. Poster presented at the Institute of Education Sciences Principal Investigator's Meeting, Washington, DC.
113. Ketterlin-Geller, L. R., Powell, S. R., & Lembke, E. S. (2020, January). *Data-based individualization to support positive outcomes for middle school students and teachers*. Paper presented at the 33rd International Congress for School Effectiveness and Improvement, Marrakech, Morocco.
112. Nelson, G., & Powell, S. R. (2019, November). *Post-secondary students' misconceptions about rational numbers: Implications for K-12 instruction*. Poster accepted at Psychology of Mathematics Education – North America Annual Conference, St. Louis, MO.

111. Thomas, E. R., Mason, E. N., Bos, S. E., Hopkins, S., Lembke, E. S., Ketterlin-Geller, L., & Powell, S. R. (2019, October). *Project STAIR: Preliminary findings*. Poster presented at the Council for Learning Disabilities Annual Conference, San Antonio, TX.
110. Powell, S. R. (2019, September). *Helping all students understand the meaning of word problems*. Presentation presented at the National Council of Teachers of Mathematics Regional Conference and Exposition, Boston, MA.
109. Powell, S. R. (2019, July). *Five essential components of mathematics intervention*. Presentation presented at Conference for the Advancement of Mathematics Teaching, San Antonio, TX.
108. Powell, S. R. (2019, June). *How to teach students to understand word problems*. Presentation presented within *What can I bring to my classroom: Putting numeracy research to work* symposium at Mathematical Cognition and Learning Society Conference, Ottawa, Canada.
107. Powell, S. R. (2019, June). *Mathematics symbol knowledge at grades 1, 3, and 5*. Presentation presented within *Mathematical discourse: The symbols we use to communicate mathematical ideas* symposium at Mathematical Cognition and Learning Society Conference, Ottawa, Canada.
106. Powell, S. R. (2019, June). *Variables that influence the algebra performance of university students*. Poster presented at Mathematical Cognition and Learning Society Conference, Ottawa, Canada.
105. Powell, S. R. (2019, April). *Algebra and rational numbers: An evaluation of the performance of university students*. Presentation presented at the Badar-Kauffman Research Conference, Kent, Ohio.
104. Berry, K. A., Powell, S. R., Forsyth, S. R., & Zapparolli, B. L. (2019, April). *The impact of equation-solving instruction within word-problem intervention for third-grade students with mathematics difficulty*. Paper presented at the American Educational Research Association Annual Meeting, Toronto, Canada.
103. Forsyth, S. R., & Powell, S. R. (2019, April). *Using shared reading to promote math-language proficiency in pre-K students: An exploratory study*. Presentation presented at the National Council of Teachers of Mathematics Annual Meeting, San Diego, CA.
102. Powell, S. R. (2019, April). *Effective intervention practices for problem solving: A focus on structures and algebraic reasoning*. Presentation presented at the National Council of Teachers of Mathematics Annual Meeting, San Diego, CA.
101. Powell, S. R. (2019, April). *Variables that influence algebra: A case for effective fraction instruction*. Poster accepted at the National Council of Teachers of Mathematics Research Conference, San Diego, CA.

100. McGraw, A., Ganley, C., Powell, S., Purpura, D., Schoen, R., & Schatschneider, C. (2019, March). *An investigation of mathematical language and its relation with mathematics and reading*. Poster presented at Society for Research in Child Development Biennial Meeting, Baltimore, MD.
99. Berry, K. A., & Powell, S. R. (2019, February). *The impact of equation-solving within word-problem intervention for third graders with mathematics difficulty*. Poster presented at Pacific Coast Research Conference, San Diego, CA.
98. Forsyth, S. R., & Powell, S. R. (2019, February). *Using trade books to teach mathematical language from preschool to second grade*. Poster presented at Pacific Coast Research Conference, San Diego, CA.
97. Powell, S. R., Bryant, D., Clarke, B., Coddling, R., & Seethaler, P. S. (2019, February). *The latest and greatest in mathematics research for students with learning difficulties*. Panel presented at Pacific Coast Research Conference, San Diego, CA.
96. Powell, S. R., & Forsyth, S. R. (2019, February). *Use of numeracy read-alouds in classrooms of at-risk prekindergarten children*. Poster presented at Pacific Coast Research Conference, San Diego, CA.
95. Forsyth, S. R., & Powell, S. R. (2019, January). *Judging math storybooks by more than their covers*. Poster presented at Council for Exceptional Children Convention and Expo, Indianapolis, IN.
94. Mason, E. N., Hirt, S., Gonzalez, J., Powell, S. R., Lembke, E., & Ketterlin-Geller, L. (2019, January). *Improving algebra readiness for middle school students: A systematic review*. Poster presented at Council for Exceptional Children Convention and Expo, Indianapolis, IN.
93. Powell, S. R. (2019, January). *Five essential components of mathematics intervention*. Presentation presented at Council for Exceptional Children Convention and Expo, Indianapolis, IN.
92. Powell, S. R., & Forsyth, S. R. (2019, January). *How caregivers and educators use early numeracy read-alouds*. Panel presented at Council for Exceptional Children Convention and Expo, Indianapolis, IN.
91. Powell, S. R., & Fuchs, L. S. (2019, January). *Effective word-problem instruction: Facilitating math reasoning*. Multi-presentation session within *Boosting math outcomes for students with learning disabilities* presented at Council for Exceptional Children Convention and Expo, Indianapolis, IN.
90. Ennis, R., Lane, K., Piasta, S., & Powell, S. (2019, January). *Tricks of the trade: Strategies for research planning and implementation*. Panel presented at Institute of Education Sciences PI Meeting, Washington, DC.
89. Powell, S. R. (2018, November). *Solving word problems using schemas and equations*. Presentation presented at National Council of Teachers of Mathematics Regional Conference and Exposition, Kansas City, MO.

88. Stevens, E. A. & Powell, S. R. (2018, November). *Supporting struggling learners' word-problem solving using schema instruction*. Presentation presented at National Council of Teachers of Mathematics Regional Conference and Exposition, Kansas City, MO.
87. Forsyth, S. R., & Powell, S. R. (2018, October). *Using children's book to support mathematics language and vocabulary development*. Poster presented at the Council for Learning Disabilities Annual Conference, Portland, OR.
86. Hirt, S. M., Gonzalez, J. M., Powell, S. R., Lembke, E. S., Ketterlin-Geller, L., & Mason, E. N. (2018, October). *Improving algebra readiness for middle school students: A literature review*. Poster presented at the Council for Learning Disabilities Annual Conference, Portland, OR.
85. Powell, S. R. (2018, October). *Rational numbers knowledge is essential for algebra success*. Presentation within *Research on problems of practice in mathematics instruction and assessment* panel presented at the Council for Learning Disabilities Annual Conference, Portland, OR.
84. Powell, S. R. (2018, July). *How students with mathematics difficulty answer questions about mathematics vocabulary*. Presentation accepted at Division of International Special Education and Services conference, Cape Town, South Africa.
83. Berry, K. A., Powell, S. R., Barnes, M., Benz, S., Forsyth, S. R., Martinez-Lincoln, A., & Zapparolli, B. (2018, April). *Word-problem intervention for students with mathematics difficulty and differential performance favoring females over males*. Presentation presented at American Educational Research Association Annual Meeting, New York, NY.
82. Powell, S. R., Hughes, E. M., & Stevens, E. A. (2018, April). *Be precise with math language: Instead of this, say that!* Presentation presented at National Council of Teachers of Mathematics Annual Meeting, Washington, DC.
81. Powell, S. R. (2018, April). *Investigating the connection between word problems and mathematical symbols*. Presentation within *Rigorous research to improve learning in elementary math for all students* symposium presented at the National Council of Teachers of Mathematics Research Conference, Washington, DC.
80. Berry, K. A., & Powell, S. R. (2018, February). *Girls and STEM: Improved math performance and confidence through intensive word-problem intervention*. Presentation presented at Council for Exceptional Children Convention and Expo, Tampa, FL.
79. Forsyth, S. R., Tran, L. M. & Powell, S. R. (2018, February). *What do these words mean? Supporting content-area vocabulary growth*. Poster presented at Council for Exceptional Children Convention and Expo, Tampa, FL.
78. Martinez-Lincoln, A., Tran, L. M. & Powell, S. R. (2018, February). *Using your hands to teach math: Examination of the use of gestures during an intensive math intervention*. Poster presented at Council for Exceptional Children Convention and Expo, Tampa, FL.

77. Mason, E. N., Benz, S. A., Lembke, E., Burns, M., & Powell, S. R. (2018, February). *From professional development to implementation: A school district's account of initiating a mathematics program*. Poster presented at Council for Exceptional Children Convention and Expo, Tampa, FL.
76. Powell, S. R., Nelson, G., Forsyth, S. R., & Driver, M. K. (2018, February). *Do students understand the language of math?* Presentation presented at Council for Exceptional Children Convention and Expo, Tampa, FL.
75. Berry, K. A. & Powell, S. R. (2018, February). *Differential performance on word-problem intervention: Females favored over males with mathematics difficulty*. Poster presented at the Pacific Coast Research Conference, San Diego, CA.
74. Hughes, E. M., Powell, S. R., Lee, J. Y., & Cozad, L. C. (2018, February). *Assessing middle school mathematics vocabulary: Findings from an exploratory study*. Poster presented at the Pacific Coast Research Conference, San Diego, CA.
73. Powell, S. R., Driver, M. K., Forsyth, S. R., & Nelson, D. (2018, February). *The development of mathematics-vocabulary measures for elementary students*. Presentation presented at the Pacific Coast Research Conference, San Diego, CA.
72. Powell, S. R., & Nelson, G. (2017, October). *What mathematics vocabulary terms for first graders know?* Presentation presented at Promising Math Erikson Institute Conference, Chicago, IL.
71. Powell, S. R., & Benz, S. A. (2017, August). *Predictors of algebra performance with undergraduates: Understanding rational numbers is essential*. Presentation presented at Texas Higher Education Symposium, Austin, TX.
70. Powell, S. R. (2017, May). *An investigation of the mathematics-vocabulary knowledge of first-grade students*. Presentation within *Language and math: Guiding attention in numerical contexts* symposium presented at Association for Psychological Science Annual Convention, Boston, MA.
69. Martinez-Lincoln, A., Tran Ozor, L., & Powell, S. R. (2017, April). *Thinking with your hands: The impact of gestures on math learning*. Presentation presented at Council for Exceptional Children Convention and Expo, Boston, MA.
68. Nelson, G., & Powell, S. R. (2017, April). *Difficulty with math now indicates difficulty with math later*. Presentation presented at Council for Exceptional Children Convention and Expo, Boston, MA.
67. Powell, S. R., Benz, S. A., & Forsyth, S. R. (2017, April). *Supporting the mathematics learning of elementary students within a multi-level framework*. Panel presented at Council for Exceptional Children Convention and Expo, Boston, MA.

66. Powell, S. R., Hughes, E. M., & Stevens, E. A. (2017, April). *Instead of that...say this! How math language impacts math learning*. Presentation presented at Council for Exceptional Children Convention and Expo, Boston, MA.
65. Powell, S. R., Barnes, M. A., Berry, K. A., Martinez-Lincoln, A., Benz, S. A., & Forsyth, S. R. (2017, April). *The impact of schema instruction on word-problem solving for students at-risk for mathematics disability*. Poster presented at Society for Research in Child Development Biennial Meeting, Austin, TX.
64. Powell, S. R., Hunt, J., Torres-Velásquez, D., & Lewis, K. (2017, April). *Mathematics learning and students with disabilities*. Symposium presented at National Council of Teachers of Mathematics Research Conference, San Antonio, TX.
63. Hebert, M. A., & Powell, S. R. (2017, February). *Assessing mathematics writing in grades 3, 4, and 5: How do composition, computation, and self-efficacy skills contribute to quality?* Presentation within a symposium presented at Writing Research Across Borders, Bogota, Colombia.
62. Stevens, E. A., Rodgers, M. A., & Powell, S. R. (2017, February). *Mathematics interventions for upper elementary and secondary students: A meta-analysis of research from 1990 to 2015*. Poster presented at Pacific Coast Research Conference, San Diego, CA.
61. Powell, S. R., & Barnes, M. A. (2016, December). *Developing connections between word problems and mathematical equations to promote word-problem performance among students with mathematics difficulty*. Poster presented at the Institute of Education Sciences Principal Investigators Meeting, Washington, DC.
60. Powell, S. R. (2016, July). *Mathematics vocabulary in the elementary grades*. Presentation within a symposium presented at the Society for the Scientific Study of Reading, Porto, Portugal.
59. Powell, S. R., & Nelson, G. (2016, April). *Connections among mathematics vocabulary, general vocabulary, and computation*. Brief research report presented at National Council of Teachers of Mathematics Research Conference, San Francisco, CA.
58. Powell, S. R. (2016, April). *Influence of general vocabulary and mathematics knowledge on mathematics vocabulary*. Roundtable accepted at American Educational Research Association Annual Meeting, Washington, DC.
57. Driver, M. K., & Powell, S. R. (2016, April). *Word-problem instruction for English learners with mathematics difficulty*. Presentation presented at Council for Exceptional Children Convention and Expo, St. Louis, MO.
56. Hebert, M. A., & Powell, S. R. (2016, April). *Assessing math writing: Evidence from fourth-grade math-writing samples that supports math-writing quality*. Presentation presented at Council for Exceptional Children Convention and Expo, St. Louis, MO.

55. Hughes, E. M., Powell, S. R., Lembke, E., & Riley-Tillman, C. (2016, April). *Where's Waldo? Finding and using evidence-based interventions*. Demonstration presented at Council for Exceptional Children Convention and Expo, St. Louis, MO.
54. McMaster, K., Lembke, E., Kearns, D. M., & Powell, S. R. (2016, April). *Real school problems and research-based solutions: Lessons from the field*. Panel presented at Council for Exceptional Children Convention and Expo, St. Louis, MO.
53. Pfannenstiel, K., Zumeta Edmonds, R. O., & Powell, S. R. (2016, April). *Using intensive intervention to improve mathematics outcomes under OSEP's results driven accountability*. Presentation presented at Council for Exceptional Children Convention and Expo, St. Louis, MO.
52. Powell, S. R., & Driver, M. K. (2016, April). *Evidence-based practices of counting, comparing, and concepts and addition and subtraction*. Presentation presented at Council for Exceptional Children Convention and Expo, St. Louis, MO.
51. Powell, S. R. (2016, February). *Tiered instruction in math*. Invited preconference workshop at National Association of School Psychologists Annual Conference, New Orleans, LA.
50. Hou, F., Watts, G. W., Powell, S. R., & Hebert, M. (2016, February). *A meta-analysis of number sense instruction/intervention*. Poster presented at Pacific Coast Research Conference, San Diego, CA.
49. Powell, S. R. (2016, February). *Mathematics symbol and vocabulary knowledge of elementary students*. Poster presented at Pacific Coast Research Conference, San Diego, CA.
48. Powell, S. R. (2016, February). *Small scale science: Conducting rigorous research within a context of limited funding*. Presentation presented at Pacific Coast Research Conference, San Diego, CA.
47. Powell, S. R., & Driver, M. K. (2016, February). *Effect of intervention with nonstandard equations for students with mathematics difficulty*. Presentation presented at Pacific Coast Research Conference, San Diego, CA.
46. Powell, S. R. (2015, October). *Algebra and rational numbers performance of post-secondary students*. Panel presented at Council for Learning Disabilities Annual Conference, Las Vegas, NV.
45. Powell, S. R. (2015, October). *Research on early mathematics interventions*. Panel presented at Council for Learning Disabilities Annual Conference, Las Vegas, NV.
44. Hebert, M. A., & Powell, S. R. (2015, July). *The connection between writing skill and writing about mathematics*. Symposium presented at Society for the Scientific Study of Reading, Big Island, HI.
43. Powell, S. R. (2015, April). *Student interpretation of mathematics symbols and accompanying vocabulary*. Poster presented at American Educational Research Association Annual Meeting, Chicago, IL.

42. Powell, S. R., & Fuchs, L. S. (2015, April). *Aligning a multi-tier framework for students with mathematics difficulty*. Presentation presented at Council for Exceptional Children Convention and Expo, San Diego, CA.
41. Zumeta, R. O., & Powell, S. R. (2015, April). *Intensifying intervention within a multi-tier framework: Practical strategies for teachers*. Presentation presented at Council for Exceptional Children Convention and Expo, San Diego, CA.
40. Hebert, M. A., & Powell, S. R. (2015, February). *Assessing mathematics writing*. Presentation presented at Pacific Coast Research Conference, San Diego, CA.
39. Powell, S. R. (2015, February). *Learning trajectories related to understanding mathematics symbols*. Presentation presented at Pacific Coast Research Conference, San Diego, CA.
38. Powell, S. R. (2015, February). *The effects of algebra and rational numbers performance on post-secondary options*. Poster presented at Pacific Coast Research Conference, San Diego, CA.
37. Solis, M., & Powell, S. R. (2015, February). *A synthesis of mathematics interventions for students with Autism Spectrum Disorders*. Poster presented at Pacific Coast Research Conference, San Diego, CA.
36. Powell, S. R. (2014, July). *Improving mathematics symbol and vocabulary knowledge for students with mathematics difficulty*. Lecture presented at Division of International Special Education and Services conference, Braga, Portugal.
35. Powell, S. R., & Driver, M. K. (2014, April). *Improving equation solving and equal-sign understanding by tutoring with nonstandard equations*. Research report presented at National Council of Teachers of Mathematics Research Conference, New Orleans, LA.
34. Fuchs, L. S., Powell, S. R., & Zumeta, R. O. (2014, April). *Addressing the needs of students with persistent math difficulties through intensive intervention*. Lecture presented at Council for Exceptional Children Convention and Expo, Philadelphia, PA.
33. Powell, S. R., & Driver, M. K. (2014, April). *How mathematics symbols influence mathematics performance*. Poster presented at Council for Exceptional Children Convention and Expo, Philadelphia, PA.
32. Powell, S. R., & Driver, M. K. (2014, April). *Teaching mathematics vocabulary to students with mathematics difficulties*. Lecture presented at Council for Exceptional Children Convention and Expo, Philadelphia, PA.
31. Powell, S. R., & Driver, M. K. (2014, February). *Effect of symbolic and nonsymbolic presentations within addition tutoring*. Poster presented at the Pacific Coast Research Conference, San Diego, CA.

30. Powell, S. R. (2013, October). *Effect of nonstandard-equations tutoring for students with mathematics difficulty*. Poster presented at the Council for Learning Disabilities Annual Conference, Austin, TX.
29. Powell, S. R. (2013, October). *Efficacy of tutoring with nonstandard equations*. Lecture presented at Association of Researchers in Special Education Conference, Leipers Fork, TN.
28. Driver, M. K., Powell, S. R., & Tyler, J. E. (2013, April). *Student understanding on tests of equivalence*. Poster presented at Council for Exceptional Children Convention and Expo, San Antonio, TX.
27. Powell, S. R., Driver, M. K., & Tyler, J. E. (2013, April). *Teaching addition with an emphasis on symbols and equations*. Presentation presented at Council for Exceptional Children Convention and Expo, San Antonio, TX.
26. Powell, S. R., Driver, M. K., & Julian, T. E. (2013, February). *Tutoring effects on addition equations: Nonstandard versus standard equations*. Poster presented at the Pacific Coast Research Conference, San Diego, CA.
25. Powell, S. R. (2012, April). *Performance differences of students by test response: Multiple choice or constructed response*. Poster presented at Council for Exceptional Children Convention and Expo, Denver, CO.
24. Powell, S. R. (2012, February). *Equations and the equal sign in elementary mathematics textbooks*. Poster presented at Pacific Coast Research Conference, Coronado, CA.
23. Namkung, J., & Powell, S. R. (2012, February). *Validation of the Open Equations measure using item response theory*. Poster presented at Pacific Coast Research Conference, Coronado, CA.
22. Powell, S. R., & Fuchs, L. S. (2011, April). *Equation types in elementary mathematics series: Implications for equal sign understanding*. Poster presented at Council for Exceptional Children Convention and Expo, National Harbor, MD.
21. Powell, S. R., Fuchs, L. S., & Namkung, J. (2011, April). *Teaching regrouping in addition and subtraction: Two different approaches*. Poster presented at Council for Exceptional Children Convention and Expo, National Harbor, MD.
20. Powell, S. R., Schumacher, R. F., Fuchs, L. S., Zumeta, R. O., Namkung, J., & Marrin, S. M. (2011, April). *Word-problem instruction using algebraic number sentences: Whole-class and tutoring RTI companion programs*. Lecture presented at Council for Exceptional Children Convention and Expo, National Harbor, MD.
19. Cirino, P., Fuchs, L. S., Tolar, T. D., & Powell, S. R. (2011, April). *Profile analysis of children with MD with and without RD on mathematics competencies in 2nd and 3rd grade*. Lecture presented at Society for Research in Children Development Biennial Meeting, Montreal, Quebec, Canada.

18. Powell, S. R., & Kearns, D. K. (2010, July). *Students learning from each other: Peer tutoring in reading and mathematics*. Lecture presented at Embracing Inclusive Approaches for Children and Youth with Special Needs International Conference, Riga, Latvia.
17. Powell, S. R., & Fuchs, L. S. (2010, April). *Effect of equal-sign instruction on solving equations and word problems*. Poster presented at Council for Exceptional Children Convention and Expo, Nashville, TN.
16. Powell, S. R., Fuchs, L. S., Schumacher, R. F., Zumeta, R. O., & Marrin, S. M. (2010, April). *Responsiveness-to-intervention in second-grade computational skill: A randomized-control trial*. Lecture presented at Council for Exceptional Children Convention and Expo, Nashville, TN.
15. Schumacher, R. F., Zumeta, R. O., & Powell, S. R. (2010, April). *Solving word problems with algebraic number sentences using schema-broadening instruction*. Poster presented at Council for Exceptional Children Convention and Expo, Nashville, TN.
14. Zumeta, R. O., Schumacher, R. F., Seethaler, P. M., Powell, S. R., Fuchs, L. S., & Marrin, S. M. (2010, April) *Effects of schema-broadening tutoring on word-problem skill of students with risk for math difficulty*. Lecture presented at Council for Exceptional Children Convention and Expo, Nashville, TN.
13. Fuchs, L. S., Powell, S. R., & Schumacher, R. F. (2010, February). *Investigating word-problem and calculations interventions within an RTI framework: A randomized-control trial*. Poster presented at Pacific Coast Research Conference, Coronado, CA.
12. Powell, S. R., & Fuchs, L. S. (2009, April). *Contribution of equal-sign instruction beyond a word problem-solving intervention for students with math difficulties*. Poster presented at American Educational Research Association Annual Meeting, San Diego, CA.
11. Powell, S. R., & Fuchs, L. S. (2009, April). *Effects of math fact tutoring on students with math difficulties*. Poster presented at Council for Exceptional Children Convention and Expo, Seattle, WA.
10. Powell, S. R., Seethaler, P. M., & Fuchs, L. S. (2009, April). *Benefits of math fact practice embedded within a word problem-solving program*. Poster presented at Council for Exceptional Children Convention and Expo, Seattle, WA.
9. Seethaler, P. M., & Powell, S. R. (2009, April). *Putting it together: Progress monitoring, research-based math interventions, and RTI*. Invited preconference workshop presented at Council for Exceptional Children Convention and Expo, Seattle, WA.
8. Zumeta, R. O., Finelli, R. M., Fuchs, L. S., Powell, S. R., & Seethaler, P. M. (2009, April). *Finding X and solving word problems using schema-broadening instruction*. Poster presented at Council for Exceptional Children Convention and Expo, Seattle, WA.

7. Powell, S. R., & Fuchs, L. S. (2009, February). *Contribution of equal sign instruction beyond a word problem-solving intervention for third-grade students with math difficulties*. Poster presented at Pacific Coast Research Conference, Coronado, CA.
6. Fuchs, L. S., Fuchs, D., & Powell, S. R. (2008, June). *Effects of instrumental use of ongoing progress-monitoring data on instructional plans and student learning*. Paper presented at Council of Chief State School Officers National Conference, Orlando, FL.
5. Fuchs, L. S., Powell, S. R., Cirino, P. T., Fletcher, J. M., Fuchs, D., & Zumeta, R. O. (2008, June). *Enhancing number combinations fluency and math problem-solving skills in third graders with math and reading difficulties: A field-based randomized control trial*. Poster presented at the Institute for Education Sciences Research Conference, Washington, D.C.
4. Fuchs, L. S., Seethaler, P. M., Powell, S. R., & Zumeta, R. O. (2008, April). *Let's find X! Using Pirate Math to teach word problems*. Poster presented at the Council for Exceptional Children Convention and Expo, Boston, MA.
3. Powell, S. R., Seethaler, P. M., & Fuchs, L. S. (2008, April). *Math Flash: Teaching students to know math facts in a flash*. Presentation presented at the Council for Exceptional Children Convention and Expo, Boston, MA.
2. Fuchs, L. S., Fuchs, D., Powell, S. R., Seethaler, P. M., & Zumeta, R. O. (2008, March). *Interventions to enhance math problem solving and number combinations fluency for third-grade students with math difficulties: A field-based randomized control trial*. Paper presented at the American Educational Research Association Annual Meeting, New York, NY.
1. Powell, S. R., Seethaler, P. M., & Fuchs, L. S. (2007, April). *Pirate Math: Teaching word problem solving to students with math difficulties*. Presentation presented at the Council for Exceptional Children Convention and Expo, Louisville, KY.

INVITED PRESENTATIONS

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- State of Washington, Administrators Improving Multi-Tiered Systems of Supports (AIMS) (2024, January)
Research-validated essentials for mathematics intervention
- Teachers of Inclusive Education British Columbia – virtual (2023, October)
Essential components of math intervention (n = 130)
- Think Forward Educators – virtual (2023, August)
What's important for math intervention?
- Hand2Mind– virtual (2023, August)
Ideas about the science of math and evidence-based practices

- Teacher Education Division (TED) Early Career Special Interest Group – virtual (2023, June)
10 strategies for grant writing
- Mathematical Cognition Learning Society – virtual (2023, April)
How to write a grant (n = 49)
- Kentucky CEEDAR – virtual (2023, April)
What's important for mathematics intervention (n = 47)
- National Joint Committee on Learning Disabilities – virtual (2023, April)
Accelerating instruction to meet the needs of students: Learning recovery in math (n = 60)
- University of Padova, Padova, Italy (2023, April)
Data-based individualization (DBI) in mathematics (n = 60)
- State of Washington, Administrators Improving Multi-Tiered Systems of Supports (AIMS) (2023, January)
Research-based mathematics instruction (n = 25)
- ExcelinEd, Salt Lake City, UT (2022, November)
Solutions for math success: Start with comprehensive K-8 policy (n = 120)
- Calgary Regional Consortium, Calgary, Canada – virtual (2022, November)
How to design and deliver effective math intervention (n = 58)
- University College London, Mathematical Cognition Group – virtual (2022, November)
Essentials of mathematics instruction for exceptional learners (n = 60)
- U.S. Department of Education – virtual (2022, November)
Math and literacy series webinar
- North Carolina State Improvement Project Spring Conference, Greensboro, NC (2022, April)
Keynote: What's essential in math intervention? (n = 170)
Critical math content across Grades K-8 (n = 41)
How to set goals and monitor progress in math (n = 51)
- Math Education Special Education Colloquium, Florida State University – virtual (2022, January)
A focus on problem solving
- Professional Associate for Learning Support, Sydney, Australia – virtual (2021, November)
Effective mathematics instruction: A focus on language and multiple representations (n = 20)
- Successful Learning Conference, Sydney, Australia – virtual (2021, June)
How to design and deliver effective mathematics intervention (n = 60)
Essential components of mathematics intervention (n = 59)

Texas Association of Supervisors of Mathematics – virtual (2021, March)

Teaching the language of mathematics (n = 45)

Learning Disabilities Association of America – virtual (2021, February)

Mathematics and students with LD: What we know and what we can do

The University of Texas at Austin, Advisory Council Meeting (2020, October)

Equitable practices in the College of Education (n = 64)

Global Math Department – virtual (2020, October)

What works in math intervention (n = 135)

The University of Texas at Austin, Osher Lifelong Learning Institute – virtual (OLLI; 2020, September)

Narrowing the achievement gap in education: A matter of racial justice (n = 140)

International Dyslexia Association of Connecticut – virtual (2020, June)

Providing support to students experiencing math difficulty (n = 98)

Vanderbilt University, Nashville, TN (2020, January)

How one math symbol started a line of research (n = 19)

Sultan Qaboos University, Muscat, Oman (2019, November)

Explicit instruction in mathematics (n = 30)

Five essential components of mathematics intervention (n = 90)

Helping all students succeed in mathematics

Division for Learning Disabilities at Teacher Education Division, New Orleans, LA (2019, November)

Mathematics strategies to support intensifying interventions (n = 14)

Texas Association of Supervisors of Mathematics, Austin, TX (2019, October)

Evidence-based practices to support students with mathematics difficulties (n = 78)

Idaho School Psychologist Association, Boise, ID (2019, October)

Five components of effective mathematics intervention (n = 160)

Freie Universität, Berlin, Germany (2019, April)

A word-problem intervention for students with mathematics difficulty

University of Missouri, Columbia, MO (2018, December)

The language of mathematics: Research studies about symbols, vocabulary, and word problems

Nebraska Council for Exceptional Children, Lincoln, NE (2018, May)

Important considerations for mathematics intervention

The University of Texas at Austin, Advancing STEM Education Research (2018, April)
Investigating the connection between word problems and mathematical symbols

Southern Methodist University, Research in Mathematics Education Conference (2018, February)
How to help students with mathematics difficulties become expert problem solvers

The University of Texas at Austin (2017, November)
Ed Talk: Early math predicts later math: Implications for intervention

University of Wisconsin—Madison, Madison, WI (2017, March)
Translating research from educational psychology to children with mathematics difficulty

University of Connecticut, Storrs, CT (2016, November)
Evidence-based practices in general and special education
Mathematics instruction for students with learning difficulties

National Association of School Psychologists, New Orleans, LA (2016, February)
Tiered instruction in mathematics

Southern Methodist University, Research in Mathematics Education Conference, Dallas, TX (2015, February)
Solving word problems using schemas

University of Minnesota, Minneapolis, MN (2015, February)
Applying for university jobs

University of Connecticut, Storrs, CT (2014, October)
How to turn one math symbol into a line of research: Advice for graduate students

Iowa State University, Ames, IA (2014, October)
From math symbol to math intervention: A randomized-control trial for second-grade students with math difficulty

University of Exeter, Exeter, England (2014, March)
Peer-assisted learning strategies in mathematics

PRESENTATIONS: STATES, DISTRICTS, and SCHOOLS

414, 415, 416, 417, 418. Rhode Island Math for Fall, Warwick, RI (2024, March)
Essential components of math interventions and SDI
Word problem problems? K-5 schema-based instruction
Essential components of math interventions and SDI
Word problem problems? K-5 schema-based instruction
Table talk: Word problems

413. Ohio P20 Literacy and Math Tutoring Project – virtual (2024, February)
Synchronous learning session #4
- 411, 412. Saline Schools, Saline, MI – virtual (2024, February)
Grades K-2: Fluency and word-problem solving
Grades 3-5: Fluency and word-problem solving
410. Northampton County Public Schools – virtual (2024, February)
Community of practice: Elementary
409. Ohio P20 Literacy and Math Tutoring Project – virtual (2024, February)
Community of practice #4: Successes and sustainability
408. The University of Texas at Austin Charter Elementary School, Austin, TX (2024, February)
What’s important for Tier 2 mathematics?
407. Northampton County Public Schools – virtual (2024, February)
Community of practice: Elementary
406. Specific Learning Disability Support Project – virtual (2024, January)
Word problems? No problem! (n = 181)
405. Ohio P20 Literacy and Math Tutoring Project, Toledo, OH (2024, January)
Action Forum #2: Data-based decision making
404. Ohio P20 Literacy and Math Tutoring Project, North Canton, OH (2024, January)
Action Forum #2: Data-based decision making
403. Ohio P20 Literacy and Math Tutoring Project, Marietta, OH (2024, January)
Action Forum #2: Data-based decision making
402. Ohio P20 Literacy and Math Tutoring Project, Cincinnati, OH (2024, January)
Action Forum #2: Data-based decision making
401. Northampton County Public Schools – virtual (2024, January)
Word problems
- 397, 398, 399, 400. Kansas MTSS and Alignment, Lawrence, KS (2024, January)
Kansas Math Project Grades 3-5: Understanding fractions
Kansas Math Project Grades 3-5: Computation of fractions
Kansas Math Project Grades 3-5: Decimals
Kansas Math Project Grades 3-5: Multiplication and division computation
- 393, 394, 395, 396. Kansas MTSS and Alignment, Dodge City, KS (2024, January)
Kansas Math Project Grades 3-5: Understanding fractions

Kansas Math Project Grades 3-5: Computation of fractions

Kansas Math Project Grades 3-5: Decimals

Kansas Math Project Grades 3-5: Multiplication and division computation

391, 392. Academy District 20, Colorado Springs, CO— virtual (2024, January)

Mathematics essentials: Vocabulary, representations, modeling, practice, and word problems

Mathematics essentials: Vocabulary, representations, modeling, practice, and word problems

390. Sunnyvale School District, Sunnyvale, CA – virtual (2023, December)

Vertical planning, vocabulary, and representations

388, 389. Saline Schools, Saline, MI – virtual (2023, December)

Grades K-2: Vocabulary and meanings of the operations

Grades 3-5: Vocabulary, place value, and computation

387. Northampton County Public Schools – virtual (2023, November)

Representations, modeling, and practice

386. Ohio P20 Literacy and Math Tutoring Project – virtual (2023, November)

Synchronous learning session #3: Fractions and algebra

385. Ohio P20 Literacy and Math Tutoring Project – virtual (2023, November)

Synchronous learning session #3: Number sense and whole numbers

384. Northampton County Public Schools – virtual (2023, November)

Vocabulary and Fluency

383. Ohio P20 Literacy and Math Tutoring Project – virtual (2023, November)

Community of practice #3: Tutoring essentials in math

381, 382. Saline Schools, Saline, MI – virtual (2023, October)

Grades K-2: Counting principles and meanings of the operations

Grades 3-5: Meanings of the operations and fluency

380. Ohio P20 Literacy and Math Tutoring Project, Dublin, OH (2023, October)

Action Forum #1: Vocabulary and fluency (n = 50)

379. Ohio P20 Literacy and Math Tutoring Project, North Canton, OH (2023, October)

Action Forum #1: Vocabulary and fluency (n = 60)

377, 378. Academy District 20, Colorado Springs, CO (2023, October)

Evidence-based instructional practices for mathematics: Elementary leads (n = 55)

Evidence-based instructional practices for mathematics: Secondary leads (n = 25)

- 373, 374, 375, 376. Kansas MTSS and Alignment, Lawrence, KS (2023, October)
Kansas Math Project Module C: Systematic and explicit instruction (n = 90)
Kansas Math Project Module E: Language, understanding, fluency, and problem solving (n = 90)
Kansas Math Project Grades 3-5: Addition and subtraction
Kansas Math Project Grades 3-5: Multiplication and division facts
- 368, 369, 370, 371, 372. Kansas MTSS and Alignment, Dodge City, KS (2023, October)
Kansas Math Project Module C: Systematic and explicit instruction (n = 60)
Kansas Math Project Module E: Language, understanding, fluency, and problem solving (n = 60)
Kansas Math Project Grades PreK-2: Place value
Kansas Math Project Grades PreK-2: Time and money
Kansas Math Project Grades PreK-2: Multiplication and division
367. Specific Learning Disability Support Project, Champaign, IL (2023, September)
Five best practices for math instruction (n = 35)
366. Ohio P20 Literacy and Math Tutoring Project – virtual (2023, September)
Synchronous learning session #1: Resources for providing high-quality tutoring in mathematics
365. Ohio P20 Literacy and Math Tutoring Project – virtual (2023, August)
Community of practice #1: Essential components of an effective tutoring project
364. Brownsville ISD, Brownsville, TX (2023, August)
Essential of mathematics in the early elementary grades
363. Iowa Education Conference, Des Moines, IA (2023, June)
Essentials for math intervention (n = 70)
- 361, 362. Pennsylvania Training and Technical Assistance Network – virtual (2023, June)
Importance of language in the math classroom (n = 233)
Word problems? No problem (n = 175)
- 357, 358, 359, 360, 361. Dodge City Unified School District 443, Dodge City, KS (2023, June)
Kansas Math Project Module A: All students can learn math (n = 163)
Kansas Math Project Module B: Progressions that lead to long-term proficiency (n = 163)
Kansas Math Project Module C: Systematic and explicit instruction (n = 163)
Kansas Math Project Module D: Using Data to inform instruction and intervention (n = 163)
Kansas Math Project Module E: Language, understanding, fluency, and problem solving (n = 163)
356. Ohio P20 Literacy and Math Tutoring Project – virtual (2023, May)
Community of practice #5: Effective tutoring practices
355. Oakland Gardens School, New York, NY – virtual (2023, April)
Math at home

354. Ohio P20 Literacy and Math Tutoring Project, Findlay, OH (2023, April)
Action Forum #2: Engaging and motivating students through effective tutoring (n = 48)
353. Ohio P20 Literacy and Math Tutoring Project, Delhi, OH (2023, April)
Action Forum #2: Engaging and motivating students through effective tutoring (n = 55)
352. Ohio P20 Literacy and Math Tutoring Project, North Canton, OH (2023, April)
Action Forum #2: Engaging and motivating students through effective tutoring (n = 70)
351. Ohio P20 Literacy and Math Tutoring Project, Marietta, OH (2023, April)
Action Forum #2: Engaging and motivating students through effective tutoring (n = 63)
350. Commonwealth Charter Academy – virtual (2023, April)
Geometry (n = 279)
- 348, 349. Commonwealth Charter Academy – virtual (2023, March)
Place value and money (n = 125)
Word problems (n = 180)
347. Ohio P20 Literacy and Math Tutoring Project – virtual (2023, March)
Synchronous learning session #4: Texts and representations
346. Berks County Intermediate Unit, Reading, PA – virtual (2023, March)
High-quality math instruction: Putting it together
345. Ohio P20 Literacy and Math Tutoring Project – virtual (2023, February)
Community of practice #4: Texts and representations
- 341, 342, 343, 344. Kansas MTSS and Alignment, Great Bend, KS (2023, February)
Module Grades PreK-2: Place value
Module Grades PreK-2: Addition and subtraction facts
Module Grades 3-5: Computation of fractions
Module Grades 3-5: Perimeter and area
- 337, 338, 339, 340. Kansas MTSS and Alignment, Topeka, KS (2023, February)
Module Grades PreK-2: Counting and cardinality
Module Grades PreK-2: Addition and subtraction computation
Module Grades 3-5: Understanding fractions
Module Grades 3-5: Multiplication and division
- 334, 335, 336. John Steptoe School, New York, – virtual (2023, February)
Best practices in math: Grades K-2 fluency and representations
Best practices in math: Grades 3-5 fluency and representations
Best practices in math: Grades 6-8 fluency and representations

333. Young Leaders Elementary, New York, NY – virtual (2023, February)
Comparison word problems
332. Ohio P20 Literacy and Math Tutoring Project – virtual (2023, February)
Synchronous learning session #3: Fluency
331. Young Leaders Elementary, New York, NY – virtual (2023, February)
Equal groups word problems
330. Ohio P20 Literacy and Math Tutoring Project – virtual (2023, January)
Community of practice #3: Fluency
- 328, 329. Commonwealth Charter Academy – virtual (2023, January)
Addition and subtraction (n = 135)
Fractions (n = 180)
327. Berks County Intermediate Unit, Reading, PA – virtual (2023, January)
Leveraging word problems – Part 2
326. Virginia Department of Education, Petersburg, VA – virtual (2023, January)
Check-in and data-based decision making: Elementary
- 324, 325, 326. John Steptoe School, New York, NY (2023, January)
Best practices in math: Grades K-2 modeling, practice, and word problems
Best practices in math: Grades 3-5 modeling, practice, and word problems
Best practices in math: Grades 6-8 modeling, practice, and word problems
323. Virginia Department of Education, Petersburg, VA – virtual (2023, January)
Check-in and data-based decision making: Secondary
322. Virginia Department of Education, Petersburg, VA – virtual (2023, January)
Best practices for fluency and vocabulary
321. Allegheny Intermediate Unit, Homestead, PA – virtual (2023, January)
Schema-based word-problem instruction
320. Young Leaders Elementary, New York, NY – virtual (2023, January)
Change word problems
319. Young Leaders Elementary, New York, NY – virtual (2022, December)
Difference word problems
- 316, 317, 318. John Steptoe School, New York, NY – virtual (2022, December)
Best practices in math: Grades K-2 math language and fluency
Best practices in math: Grades 3-5 math language and fluency

Best practices in math: Grades 6-8 math language and fluency

- 315. Ohio P20 Literacy and Math Tutoring Project – virtual (2022, December)
Literacy and math: Math vocabulary and word-problem solving (n = 40)
- 314. Ohio P20 Literacy and Math Tutoring Project – virtual (2022, December)
Action forum #1: Data-based decision making (n = 54)
- 313. Berks County Intermediate Unit, Reading, PA – virtual (2022, December)
Leveraging word problems – Part 1 (n = 20)
- 311, 312. Michigan MTSS Conference, Lansing, MI (2022, November)
Using data-based decision making in math within an MTSS framework (n = 68)
Five essentials for math instruction within an MTSS framework (n = 58)
- 310. Young Leaders Elementary, New York, NY – virtual (2022, November)
Total word problems (n = 9)
- 308, 309. Commonwealth Charter Academy – virtual (2022, November)
Early numeracy (n = 121)
Operations (n = 182)
- 307. Ohio P20 Literacy and Math Tutoring Project – virtual (2022, November)
Synchronous learning session #2: Explicit instruction in secondary math
- 306. Educational Service Center 3, Victoria, TX (2022, November)
Teaching math in middle school (n = 24)
- 305. Young Leaders Elementary, New York, NY (2022, November)
Word problems? No problem! (n = 10)
- 304. Virginia Department of Education, Petersburg, VA – virtual (2022, November)
Best practices for word-problem solving (n = 20)
- 303. Kansas MTSS and Alignment, Topeka, KS (2022, November)
Module A: Essentials of math instruction (n = 41)
Module B: Understanding, language, fluency, and problem solving in mathematics (n = 41)
- 302. Kansas MTSS and Alignment, Great Bend, KS (2022, November)
Module A: Essentials of math instruction (n = 31)
Module B: Understanding, language, fluency, and problem solving in mathematics (n = 31)
- 301. Ohio P20 Literacy and Math Tutoring Project – virtual (2022, October)
Community of practice #2: Explicit instruction and feedback (n = 45)

300. Tiered Interventions using Evidence-based Research (TIER) – virtual (2022, October)
Diagnostic assessments in mathematics (n = 42)
299. Berks County Intermediate Unit, Reading, PA – virtual (2022, October)
High quality Tier 1 math instruction
298. Ohio P20 Literacy and Math Tutoring Project – virtual (2022, October)
Synchronous learning session #1: Effective tutoring in mathematics: Elementary (n = 29)
297. Ohio P20 Literacy and Math Tutoring Project – virtual (2022, September)
Community of practice #1: Effective tutoring (n = 84)
296. Berks County Intermediate Unit, Reading, PA – virtual (2022, September)
Math language and fluency (n = 29)
- 293, 294, 295. Kansas Multi-tier Systems of Supports Symposium, Wichita, KS (2022, September)
Five components of math intervention (n = 180)
Using schemas to teach students to solve word problems (n = 90)
Teaching students according to the Science of Math (n = 125)
- 291, 292. Rio Hondo Independent School District, Rio Hondo, TX (2022, August)
Essential math instruction Day 1 (n = 50)
Essential math instruction Day 2 (n = 50)
290. Medina Valley Independent School District, Castroville, TX (2022, August)
Word problems? No problem! (n = 78)
- 288, 289. Education Service Center 20, San Antonio, TX – virtual (2022, August)
Specially designed math instruction Grades K-3 (n = 9)
Specially designed math instruction Grades 4-8 (n = 7)
287. Hutto Independent School District, Hutto, TX (2022, August)
Word problem problems? Key to math word-problem solving (n = 35)
- 285, 286. Appalachia Intermediate Unit 8, Altoona, PA (2022, August)
Acquisition to fluency via systematic instruction (n = 75)
Attacking word problems with schema instruction (n = 75)
- 282, 283, 284. Virginia Department of Education, Petersburg, VA – virtual (2022, July)
Essentials for mathematics intervention
Manipulatives for Grades K-5
Manipulatives for Grades 6-12
- 280, 281. Education Service Center 3, Victoria, TX – virtual (2022, July)
Data-based decision making in math

Math progress monitoring: Measures, goal setting, and data-based decision making

- 277, 278, 279. Intermediate Unit 12, New Oxford, PA (2022, June)
The Science of Math within an MTSS framework
Best practices in Tier 1 instruction
Word problems? No problem
276. Foothills Academy, Calgary, Alberta – virtual (2022, April)
The five essentials for math intervention for students struggling with math (n = 35)
275. The Oakland Gardens School, New York, NY – virtual (2022, March)
Bridging mathematics and the home
274. Los Fresnos Consolidated Independent School District, Los Fresnos, TX (2022, March)
Essential components of mathematics intervention
- 272, 273. Bogota School District, Bogota, NJ – virtual (2022, March)
Word problems? No problem! (n = 20)
Systematic instruction in mathematics: Modeling
271. Bogota School District, Bogota, NJ – virtual (2022, February)
Systematic instruction in mathematics: Supports
270. Education Service Center 13, Austin, TX (2022, February)
Word problem problems? Effective strategies for math word-problem instruction (n = 63)
269. Education Service Center 3, Victoria, TX (2021, November)
Word problems? No problem! (n = 32)
268. Consortium on Reading Excellence in Education (CORE) – virtual (2021, November)
Word problems? No problem! (n = 2,200)
- 266, 267. Clearwater Public Schools, Clearwater, KS – virtual (2021, November)
Essential components of mathematics intervention (n = 13)
Word-problem solving: A focus on schemas (n = 13)
265. New York City Department of Education, New York, NY – virtual (2021, October)
Instructional design features of effective Tier 2 intervention (n = 32)
- 263, 264. Leander ISD, Leander, TX – virtual (2021, October)
Effective math components of mathematics intervention: Mathematics language (n = 31)
Effective math components of mathematics intervention: Word-problem solving (n = 31)
262. Marburn Academy, New Albany, OH – virtual (2021, October)
Word problem problems? Effective instruction for math word problems (n = 28)

261. Education Service Center 6, Huntsville, TX (2021, October)
Effective components of mathematics intervention (n = 26)
260. New York City Department of Education, New York, NY – virtual (2021, October)
The language of mathematics: The importance of precise vocabulary in the MTSS guide (n = 64)
259. Katy Independent School District, Katy, TX – virtual (2021, August)
Mathematics progress monitoring and determining response (n = 70)
- 257, 258. Kerrville Independent School District, Kerrville, TX (2021, August)
Intensive intervention in elementary mathematics (n = 22)
Intensive intervention in secondary mathematics (n = 25)
256. Education Service Center 3, Victoria, TX (2021, July)
Effective components of mathematics intervention (n = 36)
255. Education Service Center 20, San Antonio, TX – virtual (2021, June)
Abandon key words: How to effectively teach word-problem solving (n = 91)
254. Austin Independent School District – virtual (2021, June)
Mathematics intervention in Grades 2-5: Inclusion in Texas modules (n = 25)
Mathematics intervention in Grades 6-8: Inclusion in Texas modules (n = 12)
253. Pennsylvania Training and Technical Assistance Network, Harrisburg, PA – virtual (2021, April)
Evidence-based math practices and interventions for middle and high school learners (n = 24)
- 249, 250, 251, 252. Division for Research – virtual (2021, March)
[*Five* full years*](#) (n = 55)
[*Research agenda*](#) (n = 40)
[*Teaching and service*](#) (n = 35)
[*Promotion and tenure committees*](#) (n = 34)
248. Consortium on Reading Excellence in Education (CORE) – virtual (2021, January)
Multi-tiered systems of support: Designing and implementing interventions for mathematics learning (n = 498)
247. Education Service Center 2, Corpus Christi, TX – virtual (2020, November)
Essential components of mathematics intervention (n = 34)
246. Consortium of State Organizations for Texas Teacher Education – virtual (2020, October)
TIER materials to enhance the pre-service teaching curriculum
- 239-245. Division for Research – virtual (2020, October)
What is the job search process? (n = 86)

How do I prepare my application? (n = 80)
What should I expect in an initial interview? (n = 66)
What happens during an on-campus interview? (n = 60)
What about the job talk? (n = 52)
I have an offer...now what? (n = 51)

238. Tiered Interventions using Evidence-based Research (TIER) – virtual (2020, September)
Intervention within remote learning environments: Mathematics (n = 112)

235, 236, 237. William and Mary, Training and Technical Assistance Center – virtual (2020, August)
Word problems? No problem! Attack strategies and additive schemas (n = 26)
Word problems? No problem! Multiplicative schemas
Word problems? No problem! Multi-step word problems

232, 233, 234. Lincoln Intermediate Unit 12, New Oxford, PA – virtual (2020, July)
Essentials of multi-tiered systems of support in mathematics (n = 86)
How to design targeted and intensive intervention (n = 45)
How to deliver targeted and intensive intervention (n = 22)

231. Pennsylvania Training and Technical Assistance Network, Harrisburg, PA – virtual (2020, July)
Teaching students to solve addition and subtraction word problems (n = 166)

230. New York City Department of Education, New York, NY (2020, May)
Data-based individualization: Planning for next year (n = 3)

229. New York City Department of Education, New York, NY (2020, March)
Data-based individualization: Rational numbers and problem solving (n = 6)

227, 228. Griffin RESA Griffin, GA (2020, February)
Five essential components of mathematics intervention (n = 87)
Word problems? No problem! (n = 46)

226. Education Service Center 20 San Antonio, TX (2020, January)
Intensive interventions to improve the mathematics outcomes (n = 43)

225. State of North Carolina (2019, November)
Task analyze learning progressions to identify where to start intensive intervention (n = 16)

223, 224. New York City Department of Education, New York, NY (2019, October)
Data-based individualization: Introduction (n = 22)
Data-based individualization: School-level support (n = 5)

222. Education Service Center 10, Richardson, TX (2019, September)
Data-based individualization in secondary mathematics (n = 18)

221. Judson ISD, Live Oak, TX (2019, September)
Intensive intervention in mathematics: Hands-on tools for rational numbers and algebra (n = 13)
- 218, 219, 220. Commonwealth Charter Academy, Malvern, PA (2019, August)
Five essential components of mathematics intervention
Using concrete and pictorial tools to help students understand fractions
Effective word-problem instruction
- 216, 217. Boerne ISD, Boerne, TX (2019, August)
Effective Word-Problem Solving: Grades K-2
Effective Word-Problem Solving: Grades 3-5
215. Judson ISD, Live Oak, TX (2019, August)
Intensive intervention in mathematics: Explicit instruction, precise language, and hands-on tools for whole numbers
- 209, 210, 211, 212, 213, 214. Pflugerville ISD, Pflugerville, TX (2019, August)
Using manipulatives to teach early numeracy
Using manipulatives to teach addition and subtraction
Using manipulatives to teach multiplication and division
Using manipulatives to teach fraction concepts
Using manipulatives to teach fraction computation
Using manipulatives to teach geometry
208. Region 15, San Angelo, TX (2019, July)
Data-based individualization in mathematics
207. Summer 2019 RTI Leadership Institute, Austin, TX (2019, June)
Data-based individualization (DBI) in mathematics
206. Kerrville ISD, Kerrville, TX (2019, June)
Intensive interventions to improve mathematics outcomes for students with learning difficulties
205. New York City Department of Education, New York, NY (2019, May)
Data-based individualization in mathematics: Planning for 2019-2020 school year
204. EdVestors, Boston, MA (2019, May)
Teaching mathematics to students with disabilities
203. New York City Department of Education, New York, NY (2019, March)
Data-based individualization in mathematics: Rational numbers and word problems
202. Texas Association of Secondary School Principals Conference, Austin, TX (2019, March)
Essential components of mathematics intervention

201. Education Service Center 20, Live Oak, TX (2019, February)
Intensive interventions to improve the mathematics outcomes for students with learning difficulties
200. Heights Christian Schools, La Mirada, CA (2019, February)
Five components of effective mathematics instruction
199. Education Service Center 20, San Antonio, TX (2018, December)
Intensive interventions to improve the mathematics outcomes for students with learning difficulties
198. National Center for Intensive Intervention (2018, November)
Knowledge building: Tiers 2 and 3
- 196, 197. Education Service Center 13, Austin, TX (2018, October)
Math interventions – Tier 2
Math interventions – Tier 3
195. HELP Group Summit, Los Angeles, CA (2018, October)
Six effective components of mathematics instruction for students with learning difficulties
194. Park Academy, Lake Oswego, OR (2018, October)
Considerations for mathematics intervention
- 191, 192, 193. Ralston Schools, Ralston, NE (2018, October)
Conceptual understanding of early numeracy
Conceptual understanding of addition and subtraction
Conceptual understanding of multiplication and division
190. Los Fresnos CISD, Los Fresnos, TX (2018, October)
Multi-tier support for students with mathematics difficulty
189. New York City Department of Education, New York, NY (2018, October)
Data-based individualization in mathematics: Session 1
188. Pflugerville ISD, Pflugerville, TX (2018, September)
Considerations for mathematics intervention
- 186, 187. Marburn Academy, New Albany, OH (2018, September)
The language of mathematics: Grades K-6
The language of mathematics: Grades 7-12
185. Pleasanton ISD, Pleasanton, TX (2018, August)
Effective problem solving

184. Eanes ISD, Austin, TX (2018, June)
Considerations for mathematics intervention
- 182, 183. Austin ISD, Austin, TX (2018, June)
Word problems? No problem!
Effective problem solving: A focus on word-problem structures
- 180, 181. Content Teaching Academics, Harrisonburg, VA (2018, June)
Five essential components for mathematics intervention
Evidence-based interventions and practices for students with mathematics difficulty
179. Eanes ISD, Austin, TX (2018, June)
Considerations for mathematics intervention
178. Summer 2018 RTI Leadership Institute, Austin, TX (2018, June)
Intensive intervention
- 176, 177. IU13, Lancaster, PA (2018, June)
How to teach elementary math problem solving
How to teach problem solving in middle school
175. Building RTI Capacity Spring Institute, San Antonio, TX (2018, May)
Intensive intervention in mathematics
174. Ferguson/Florissant School District, Ferguson, MO (2018, May)
Manipulatives for middle school mathematics intervention
173. New York City Department of Education, New York, NY (2018, May)
Data-based individualization in mathematics: Planning for 2018-2019
172. Casis Elementary, Austin, TX (2018, March)
Mathematics in school and home: What we've learned from research
171. Building RTI Capacity Winter Institute, El Paso, TX (2018, March)
Intensive intervention in mathematics
170. EdVestors, Boston, MA (2018, March)
Mathematics for students with learning difficulties
169. New York City Department of Education, New York, NY (2018, March)
Data-based individualization in mathematics: Rational numbers and word problems
168. Navarro ISD, Seguin, TX (2018, March)
Mathematics support for students with learning difficulties

167. Building RTI Capacity Winter Institute, Plano, TX (2018, February)
Intensive intervention in mathematics
166. Pleasanton ISD, Pleasanton, TX (2018, January)
Considerations for students with mathematics difficulties
165. Ferguson/Florissant School District, Ferguson, MO (2017, November)
Mathematics instruction
164. ESU3, Omaha, NE (2017, October)
Mathematics intervention
163. New York City Department of Education, New York, NY (2017, October)
Data-based individualization in mathematics: Overview
162. Pennsylvania Training and Technical Assistance Network, Harrisburg, PA (2017, October)
Evidence-based practices related to problem solving
161. Grand Blanc Academy, Grand Blanc, MI (2017, September)
Effective word-problem solving: Pirate Math
- 158, 159, 160. Kansas Multi-tier Systems of Supports Symposium, Wichita, KS (2017, September)
Early numeracy concepts
Mathematics peer tutoring in the early elementary grades
Mathematics symbols and vocabulary in the elementary grades
- 156, 157. Partnership Academy, Richfield, MN (2017, September)
Grades K-1 Peer Assisted Learning Strategies
Grades 2-6 Peer Assisted Learning Strategies
155. American Institutes of Research, Central Fall, RI (2017, September)
Grades 2-6 Peer Assisted Learning Strategies
154. Austin ISD Science and Mathematics X Conference, Austin, TX (2017, August)
Using hands-on materials to support learning of the operations
153. Summer RTI Leadership Summit, Austin, TX (2017, August)
Using data: Intervention
- 150, 151, 152. Content Teaching Academics, Harrisonburg, VA (2017, June)
Keynote
Effective mathematics instruction for students with learning difficulties (Grades 6 and 7)
Effective mathematics instruction for students with learning difficulties (Grade 8 and beyond)

149. New York City Department of Education, New York, NY (2017, June)
Data-based individualization and mathematics
148. Texas Regional Collaboratives, Austin, TX (2017, May)
Research to practice: Explicit instruction and word problems for upper elementary students
147. EdVestors, Boston, MA (2017, May)
Teaching of students with mathematics learning difficulties
146. New York City Department of Education, New York, NY (2017, April)
Differentiation of algebra for students with learning difficulties
145. ESU3, Omaha, NE (2017, February)
Using manipulatives to improve mathematics instruction
144. Ferguson/Florissant School District, Ferguson, MO (2017, February)
Using evidence-based practices in mathematics across tiers of instruction
143. New York City Department of Education, New York, NY (2017, February)
Rtl in mathematics: Putting together a school-wide Rtl plan
142. New York City Department of Education, New York, NY (2017, January)
Rtl in mathematics: Tiers 2 and 3 instruction
141. New York City Department of Education, New York, NY (2016, December)
Rtl in mathematics: Tier 1 instruction
140. Wayside Charter Schools, Austin, TX (2016, December)
Explicit instruction and the concrete-representational-abstract framework
139. E3 Alliance, Austin, TX (2016, November)
Mathematics trajectories across elementary and secondary schools
138. ESU3, Omaha, NE (2016, November)
Effective mathematics instruction
137. Ferguson/Florissant School District, Ferguson, MO (2016, November)
Evidence-based practices in mathematics
136. New York City Department of Education, New York, NY (2016, November)
Rtl in mathematics: Tiered instruction
- 134, 135. The Hill Center, Durham, NC (2016, October)
Tiered instruction in mathematics
Effective ways to help your child with math

- 132, 133. Pennsylvania Training and Technical Assistance Network, Harrisburg, PA (2016, October)
Effective word-problem solving
Symbols and vocabulary in elementary mathematics
131. Saline Schools, Saline, MI (2016, October)
Mathematics instruction
130. San Angelo Independent School District, San Angelo, TX (2016, October)
Effective mathematics instruction
- 128, 129. Wayside Charter Schools, Austin, TX (2016, October)
Counting and operations
Word-problem solving in the elementary grades
127. Ferguson/Florissant School District, Ferguson, MO (2016, September)
 Observations and feedback of mathematics teaching
- 123, 124, 125, 126. MTSS Symposium, Wichita, KS (2016, September)
Early numeracy progressions
Effective word-problem solving
Hands-on materials for algebra
Importance of understanding math symbols and math vocabulary
122. Wayside Charter Schools, Austin, TX (2016, September)
Word-problem solving
121. San Angelo Independent School District, San Angelo, TX (2016, August)
Effective mathematics instruction in middle school
- 119, 120. Allen Parish Schools, Oberlin, LA (2016, June)
Effective mathematics instruction for elementary students
Effective mathematics instruction for secondary students
- 115, 116, 117, 118. Boston Public Schools, Boston, MA (2016, June)
Common barriers to student learning of mathematics: Whole numbers
Common barriers to student learning of mathematics: Rational numbers
Word-problem solving: Pirate Math
Computation: Math Wise
114. Content Teaching Academies, Harrisonburg, VA (2016, June)
Principles of mathematics instruction for students with learning difficulties
113. Training Institute on Autism, Tallahassee, FL (2016, June)
Effective mathematics instruction

112. Saline Area Schools, Saline, MI (2016, June)
Effective mathematics instruction
111. San Angelo Independent School District, San Angelo, TX (2016, June)
Effective mathematics instruction in middle school
- 109, 110. New York City Department of Education, New York, NY (2016, May)
Teaching mathematics to students with mathematics difficulty
Response to intervention
108. Grand Haven Area Public Schools, Grand Haven, MI (2016, April)
Effective mathematics instruction
107. Saline Area Schools, Saline, MI (2016, April)
Effective mathematics instruction
106. Ferguson/Florissant School District, Ferguson, MO (2016, March)
Mathematics and manipulatives: Rational numbers
- 104, 105. Rehab Seminars, Seattle, WA (2016, March)
Using manipulatives for students struggling with mathematics (K-3)
Using manipulatives for students struggling with mathematics (4-8)
103. New York City Department of Education, New York, NY (2016, March)
Peer tutoring
102. Haut Gap Middle School, Johns Island, SC (2016, February)
Word-problem solving
101. Uplift Charter Schools, Dallas, TX (2016, January)
Geometry and measurement
100. Ferguson/Florissant School District, Ferguson, MO (2015, December)
Mathematics and manipulatives: Whole numbers
99. New York City Department of Education, New York, NY (2015, December)
Problem solving
98. Northern Rhode Island Collaborative, Lincoln, RI (2015, December)
Word-problem solving
97. San Angelo Independent School District, San Angelo, TX (2015, December)
Teaching mathematics

96. Etiwanda School District, Rancho Cucamonga, CA (2015, November)
Mathematics professional development
95. New York City Department of Education, New York, NY (2015, November)
Mathematics RtI in New York City
94. Doctor Franklin Perkins School, Lancaster, MA (2015, October)
Manipulatives, mathematics, and problem solving
- 91, 92, 93. Response to Intervention Best Practices Institute, Wilmington, NC (2015, October)
Mathematics assessments for screening and progress monitoring
Mathematics instruction at tier 1
Mathematics interventions at tiers 2 and 3
90. Uplift Charter Schools, Dallas, TX (2015, October)
Mathematics problem solving
89. Etiwanda School District, Rancho Cucamonga, CA (2015, September)
Mathematics professional development
88. Ferguson/Florissant School District, Ferguson, MO (2015, September)
Teaching students with mathematics difficulty: Problem solving
87. Homer Central School District, Homer, NY (2015, September)
Grades 2 through 6 Math PALS
86. Kent Akron Association of School Psychologists, Akron, OH (2015, September)
Tiered instruction in mathematics
85. San Angelo Independent School District, San Angelo, TX (2015, September)
Word-problem solving
84. Reykjavik, Iceland (2015, August)
Mathematics peer-assisted learning strategies
83. Bristol Warren Regional School District, Warren, RI (2015, June)
Teaching mathematics to students with mathematics difficulty
82. Inclusion Institute Region 13, Austin, TX (2015, June)
Solving word problems using schemas
81. Rehab Seminars, San Antonio, TX (2015, May)
Teaching mathematics to students with mathematics difficulty

- 79, 80. Boston Public Schools, Boston, MA (2015, April)
Understanding how language and communication disorders impact mathematics
Building numeracy skills for students with poor working memory
78. Erie Public Schools, Erie, PA (2015, February)
Using manipulatives to teach mathematics
77. Grand Haven Area Public Schools, Grand Haven, MI (2015, January)
Explicit instruction in mathematics for students with mathematics difficulty
- 75, 76. IDEA Schools, Austin, TX (2015, January)
Explicit instruction
Geometry and measurement
- 73, 74. Haut Gap Middle School, Johns Island, SC (2014, November)
Mathematics progress monitoring
Differentiating mathematics instruction
72. East Troy Community Schools, East Troy, WI (2014, October)
Mathematics peer-assisted learning strategies
71. San Angelo Independent School District, San Angelo, TX (2014, October)
Using manipulatives to teach mathematics concepts
70. State of Maryland, Baltimore, MD (2014, October)
Designing intensive intervention for students with severe and persistent academic needs
69. Cheboygan-Otsego-Presque Isle ESD, Indian River, MI (2014, August)
Mathematics peer-assisted learning strategies
68. Swartz Creek Community Schools, Swartz Creek, MI (2014, May)
Explicit instruction in mathematics for students with mathematics difficulty
67. Boston Public Schools, Roxbury, MA (2014, May)
Explicit instruction in mathematics for students with mathematics difficulty
66. Spencerville Local Schools, Spencerville, OH (2014, May)
Mathematics peer-assisted learning strategies
65. Swartz Creek Community Schools, Swartz Creek, MI (2014, May)
Informal academic diagnostic assessment: Using data to guide intensive instruction
64. Bemidji Area Schools, Bemidji, MN (2014, March)
Mathematics peer-assisted learning strategies

63. State of Florida, Tallahassee, FL (2014, March)
Intensive intervention in mathematics
62. Grand Haven Area Public Schools, Grand Haven, MI (2014, January)
Designing intensive intervention for students with severe and persistent academic needs
61. Saline Area Schools, Saline, MI (2013, December)
Informal academic diagnostic assessment: Using data to guide intensive instruction
60. Bethany Christian School, Baton Rouge, LA (2013, August)
Mathematics peer-assisted learning strategies
- 57, 58, 59. Virginia Department of Education, Richmond, VA (2013, August)
Mathematics and manipulatives
Word-problem solving
Progress monitoring in reading and mathematics
56. Covert Public Schools, Covert, MI (2013, March)
Using academic progress monitoring for individualized instructional planning
55. Marion Intermediate School, Marion, VA (2012, April)
Explicit instruction
54. Hazelwood School District, Florissant, MO (2012, February)
Mathematics peer-assisted learning strategies
53. Fairfield County Educational Service Center, Lancaster, OH (2011, November)
Response to intervention: What, why, and how?
52. Old Adobe Union School District, Petaluma, CA (2011, November)
Mathematics peer-assisted learning strategies
51. New York City Public Schools, New York, NY (2011, October)
Mathematics interventions for at-risk learners
50. State of Tennessee Mathematics Summit, Nashville, TN (2011, October)
How progress monitoring is used to inform the decision-making process
49. Grand Prairie Independent School District, Grand Prairie, TX (2011, September)
Mathematics peer-assisted learning strategies
48. Brantley County School District, Nahunta, GA (2011, August)
Mathematics peer-assisted learning strategies

47. Lewiston Public Schools, Lewiston, ME (2011, August)
Mathematics peer-assisted learning strategies
46. Metro Nashville Public Schools, Nashville, TN (2011, August)
Mathematics response to intervention
45. Riverview Charter School, Beaufort, SC (2011, August)
Mathematics peer-assisted learning strategies
44. SAMSchools, Washington, DC (2011, August)
Mathematics peer-assisted learning strategies
43. Forsyth County Schools, Cumming, GA (2011, July)
Mathematics peer-assisted learning strategies
42. City Schools of Decatur, Decatur, GA (2011, March)
Mathematics peer-assisted learning strategies
41. Lewiston Public Schools, Lewiston, ME (2011, March)
Mathematics peer-assisted learning strategies
40. Ball State University, Muncie, IN (2011, February)
Mathematics peer-assisted learning strategies
39. Burns Elementary School, Burns, WY (2010, December)
Mathematics peer-assisted learning strategies
38. Drury University, Springfield, MO (2010, October)
Mathematics peer-assisted learning strategies
37. SSTAGE, Dublin, GA (2010, September)
Mathematics peer-assisted learning strategies
36. Thunder Bay Catholic School District Board, Thunder Bay, Ontario (2010, September)
Mathematics progress monitoring
35. Lighthouse Academies, Chicago, IL (2010, July)
Hands-on mathematics: Learning with manipulatives
34. State of South Carolina, Columbia, SC (2010, June)
Mathematics peer-assisted learning strategies
33. Monroeville Schools, Monroeville, PA (2010, February)
Mathematics peer-assisted learning strategies

32. Metropolitan Regional Educational Service Agency, Smyrna, GA (2010, January)
Mathematics peer-assisted learning strategies
31. Natrona County School District, Casper, WY (2010, January)
Mathematics peer-assisted learning strategies
30. Tecumseh Local School District, New Carlisle, OH (2010, January)
Mathematics peer-assisted learning strategies
29. Education Service Center 13, Austin, TX (2009, September)
Mathematics CBM and RTI at tiers 1 and 2
28. Education Service Center 11, Fort Worth, TX (2009, January)
Mathematics response to intervention
27. Superior North Catholic School Board, Nipigon, Ontario, Canada (2009, January)
Mathematics peer-assisted learning strategies
26. Superior North Catholic School Board, Windsor, Ontario, Canada (2009, January)
Mathematics peer-assisted learning strategies
25. West Virginia Council for Exceptional Children, Logan, WV (2008, October)
Response to intervention in mathematics
24. Education Service Center 20, San Antonio, TX (2008, August)
Response to intervention
23. Hiawatha Valley Education District, Winona, MN (2008, August)
Mathematics peer-assisted learning strategies
22. Hopewell SERRC, Hillsboro, OH (2008, August)
Mathematics peer-assisted learning strategies
21. Maine Township Special Education Program, Des Plaines, IL (2008, July)
Mathematics peer-assisted learning strategies
20. Knox County Schools, Edina, MO (2008, July)
Mathematics peer-assisted learning strategies
19. West Nodaway RI Schools, Burlington Junction, MO (2008, June)
Response to intervention in mathematics
18. State Support Team Region 5, Niles, OH (2008, April)
Mathematics peer-assisted learning strategies

17. Heritage Academy, Augusta, GA (2008, February)
Mathematics peer-assisted learning strategies
16. Educational Service Unit #1, Wakefield, NE (2008, February)
Mathematics peer-assisted learning strategies
15. Northern Ohio SERRC, Vermilion, OH (2007, October)
Mathematics peer-assisted learning strategies
14. Lima City Schools, Lima, OH (2007, October)
Mathematics peer-assisted learning strategies
13. Carnegie Mellon University, Pittsburgh, PA (2007, September)
Mathematics peer-assisted learning strategies
12. Fairlawn Local Schools, Sidney, OH (2007, August)
Mathematics peer-assisted learning strategies
11. Lexington Public Schools, Lexington, MA (2007, August)
Mathematics progress monitoring
10. Heartland Area Education Agency, Johnston, IA (2007, May)
Mathematics peer-assisted learning strategies
9. Nicholls State University, Thibodaux, LA (2006, September)
Mathematics peer-assisted learning strategies
8. Oakland Schools, Waterford, MI (2006, July)
Mathematics peer-assisted learning strategies
7. Eagle Academy, Toledo, OH (2006, June)
Mathematics peer-assisted learning strategies
6. West Central Ohio SERRC, Wapakoneta, OH (2005, November)
Mathematics peer-assisted learning strategies
5. Triad Local Schools, North Lewisburg, OH (2005, September)
Mathematics peer-assisted learning strategies
4. McNairy County Schools, Selmer, TN (2005, July)
Mathematics peer-assisted learning strategies
3. Wheaton School District, Wheaton, IL (2004, September)
Mathematics progress monitoring

2. Great River Area Education Agency, Burlington, IA (2004, April)
Mathematics peer-assisted learning strategies
1. Huron Intermediate School District, Bad Axe, MI (2004, February)
Mathematics peer-assisted learning strategies

PROFESSIONAL DEVELOPMENT

State of Kansas (2022-present)

- Developed modules for Kansas Math Proficiency Project, accessed by all math teachers in the state of Kansas
 - *Module C: Systematic and explicit instruction*
 - *Module E: Building students' understanding, language, fluency, and problem solving*

Inclusion in Texas Math Modules (2020)

- Developed 23 modules with lesson guides, problem sets, and vocabulary cards
- https://www.inclusionintexas.org/apps/pages/index.jsp?uREC_ID=2155039&type=d&pREC_ID=2169859
 - [Module 1: Place Value](#)
 - [Module 2: Comparison](#)
 - [Module 3: Representing Fractions](#)
 - [Module 4: Concepts of Addition](#)
 - [Module 5: Addition of Whole Numbers](#)
 - [Module 6: Addition of Rational Numbers](#)
 - [Module 7: Concepts of Subtraction](#)
 - [Module 8: Subtraction of Whole Numbers](#)
 - [Module 9: Subtraction of Rational Numbers](#)
 - [Module 10: Concepts and Multiplication](#)
 - [Module 11: Multiplication of Whole Numbers](#)
 - [Module 12: Multiplication of Rational Numbers](#)
 - [Module 13: Concepts of Division](#)
 - [Module 14: Division of Whole Numbers](#)
 - [Module 15: Division of Rational Numbers](#)
 - [Module 16: Representing Decimals](#)
 - [Module 17: Integers](#)
 - [Module 18: Addition and Subtraction on Integers](#)
 - [Module 19: Multiplication and Division of Integers](#)
 - [Module 20: Functions and Ordered Pairs](#)
 - [Module 21: Ratios, Proportions, Rates, and Percentages](#)
 - [Module 22: Representing Expressions and Equations](#)
 - [Module 23: Solving Equations](#)

National Center on Intensive Intervention (2018-2020)

- Created all materials and videos for *Intensive Intervention in Mathematics Course*
- <https://intensiveintervention.org/training/course-content/intensive-intervention-mathematics>

- [Module 1: Developing a scope and sequence for intensive intervention](#)
- [Module 2: Mathematics progress monitoring and determining response](#)
- [Module 3: Selecting and evaluating evidence-based practices in mathematics](#)
- [Module 4: intensive mathematics intervention: Instructional delivery](#)
- [Module 5: Intensive mathematics intervention: Instructional strategies](#)
- [Module 6: Whole-number content for intensive intervention](#)
- [Module 7: Rational-number content for intensive intervention](#)
- [Module 8: DBI for intensive mathematics intervention](#)

SERVICE: NATIONAL

Associate Editor

- *Assessment for Effective Intervention* (2013-2016)
- *Journal of Educational Psychology* (2020-2021)
- *Journal of Learning Disabilities* (2017-present)

Editorial Review Board

- *Assessment for Effective Intervention* (2017-present)
- *Exceptional Children* (2017-present)
- *Journal of Learning Disabilities* (2014-present)
- *Learning Disabilities Research and Practice* (2013-present)
- *Learning Disability Quarterly* (2013-present)
- *Teaching Exceptional Children* (2014-present)

Consultant

- Math and Reading Acquisitions Co-Adaptive Systems (MARCS) funded to CAST from the Institute of Education Sciences (2022-present)

Chair, Knowledge Utilization Committee

- Division for Research, Council for Exceptional Children (2017-2021)

Publications and Communications Committee

- Division for Learning Disabilities, Council for Exceptional Children (2019-present)

Expert Panelist

- Math Research and Evidence Hub funded to Center on Reinventing Public Education by Bill and Melinda Gates Foundation (2024-present)
- Project VOISE (2018)
- Texas Education Agency Commissioner's List of Early Childhood Assessments (2017)

External Committee Member

- Texas Education Agency Special Education Standards Development Committee (2019)
- Texas Education Agency Middle School Advanced Math Pathways Project (2019)

Peer Review: Journals

- *AERA Open*: 2017
- *American Educational Research Journal*: 2019
- *American Journal on Intellectual and Developmental Disabilities*: 2020
- *Assessment for Effective Intervention*: 2023, 2022, 2021, 2018, 2013 (3)
- *Behavior Research Methods*: 2016 (2)
- *Beyond Behavior*: 2021
- *Bolema: Boletim de Educação Matemática*: 2020 (2)
- *British Journal of Educational Psychology*: 2019
- *Child Development*: 2020, 2018 (2), 2017, 2016, 2015
- *Child Neuropsychology*: 2013
- *Cognition*: 2020
- *Cognition and Instruction*: 2018, 2014, 2012
- *Cognitive Development*: 2023
- *Contemporary Educational Psychology*: 2016
- *Curriculum Journal*: 2016
- *Developmental Psychology*: 2023, 2022, 2017, 2015
- *Early Childhood Research Quarterly*: 2020 (2), 2017 (3); 2016 (2)
- *Educational Evaluation and Policy Analysis*: 2013, 2012
- *Education Research*: 2016
- *Educational Research*: 2013
- *Educational Researcher*: 2017 (2), 2016, 2013
- *Educational Studies in Mathematics*: 2024, 2023, 2021, 2020
- *Empirische Sonderpädagogik (German Journal of Special Education)*: 2022
- *European Child and Adolescent Psychiatry*: 2015
- *European Journal of Psychology of Education*: 2023 (2)
- *Exceptional Children*: 2023, 2022, 2021 (2), 2019, 2018, 2017 (2), 2016, 2014
- *Exceptionality*: 2020 (2), 2014 (2), 2013, 2012, 2011 (2)
- *Journal for Research in Mathematics Education*: 2018, 2017, 2016 (2)
- *Journal of Applied Developmental Psychology*: 2020
- *Journal of Autism and Developmental Disorders*: 2020
- *Journal of Early Childhood Literacy*: 2017, 2016, 2015
- *Journal of Educational Psychology*: 2024, 2023, 2022 (2), 2020 (2), 2019 (3), 2018 (4), 2017 (2), 2016 (3), 2015 (3), 2014, 2013 (2), 2012
- *Journal of Experimental Child Psychology*: 2024 (2), 2023, 2022, 2021, 2020 (2), 2018 (4), 2017 (3), 2016 (3)
- *Journal of Learning Disabilities*: 2019 (2), 2017 (4), 2016 (4), 2015 (4), 2014 (3), 2013 (3), 2012
- *Journal of Research on Educational Effectiveness*: 2021 (2), 2016 (3), 2015 (2)
- *Journal of Mathematical Behavior*: 2021 (3), 2020, 2019 (2)
- *Journal of Mathematics Teacher Education*: 2020
- *Journal of Numerical Cognition*: 2021
- *Journal of Special Education*: 2024, 2022 (1), 2019 (2)
- *Journal of Studies in Educational Evaluation*: 2019

- *Journal of Teacher Education*: 2018
- *Language, Speech, and Hearing Services in Schools*: 2013 (2)
- *Learning and Individual Differences*: 2022, 2021, 2020, 2019, 2017 (3), 2016 (2), 2010
- *Learning and Instruction*: 2023, 2022, 2021, 2020, 2019 (2), 2015, 2011
- *Learning Disabilities: A Multidisciplinary Journal*: 2021
- *Learning Disabilities Research and Practice*: 2023, 2020 (2), 2019, 2017 (2), 2016 (5), 2015 (4), 2014 (4), 2013 (2), 2012
- *Learning Disability Quarterly*: 2023, 2021, 2019, 2018 (2), 2017, 2016 (2), 2015 (2), 2014 (2), 2013
- *Mathematical Thinking and Learning*: 2023, 2019, 2017
- *PLOS ONE*: 2019, 2018
- *Psychology in the Schools*: 2023 (2), 2022 (3)
- *Review of Educational Research*: 2023
- *Research in Mathematics Education*: 2017
- *Remedial and Special Education*: 2021 (3), 2020 (2), 2019 (2), 2018, 2016, 2015 (3), 2014 (2)
- *SAGE Open*: 2020
- *Scandinavian Journal of Educational Research*: 2021
- *School Science and Mathematics*: 2023 (2), 2019
- *Scientific Studies of Reading*: 2022
- *Studies in Educational Evaluation*: 2019
- *Teachers and Teaching: Theory and Practice*: 2024
- *Teaching and Teacher Education*: 2022, 2017, 2016
- *Teaching Exceptional Children*: 2022 (2), 2019 (2), 2018 (3), 2017 (2), 2016 (5), 2015 (4), 2014 (3)
- *Texas Mathematics Teacher*: 2021, 2019, 2018, 2017
- *The Elementary School Journal*: 2021, 2020 (5), 2019, 2018 (2), 2017, 2016 (2), 2015, 2014
- *ZDM Mathematics Education*: 2019

Guest Editor: Journals

- *The Elementary School Journal*: 2021

Peer Reviewer: Conferences

- American Educational Research Association Annual Meeting: 2019
- Council for Exceptional Children Conference: 2021, 2020, 2019, 2018, 2017, 2016, 2015, 2014, 2013
- Council for Learning Disabilities Conference: 2018, 2017, 2016
- National Council of Teachers of Mathematics Research Conference: 2017, 2016
- North American Chapter of the International Group for the Psychology of Mathematics Education: 2019
- Society for Research in Child Development Biennial Meeting: 2016
- Society for Research on Education Effectiveness (SREE): 2023, 2015, 2013, 2011

Grant Reviewer

- Research Council of KU Leuven: 2022, 2020
- National Science Foundation CAREER: 2022, 2021
- National Science Foundation DRK-12: 2022

- National Science Foundation ECR: 2022
- Center for the Advancement of Science in Space for the International Space Station: 2021
- National Academy of Education/Spencer Foundation Dissertation Fellowship: 2022, 2020
- Institute of Education Sciences, Mathematics and Science: 2019, 2018
- German Research Foundation: 2018
- Institute of Education Sciences, Low-Cost, Short-Duration Evaluation of Education Interventions, STEM: 2018

Tenure and Promotion Letter Writer

- Arizona State University
- College of Charleston
- George Mason University
- Miami University
- Stanford University
- University of Florida
- University of Maryland
- University of Virginia
- Utah State University

Peer Reviewer: Other

- Campbell Collaboration: 2017

SERVICE: UNIVERSITY

The University of Texas at Austin, Austin, TX

- Principal Investigator Support Committee (2022-present)
- Speaker at College of Education Advisory Council (2021, October)
- Texas Education Curriculum Literacy Research Committee (2021-2022)
- Faculty search committee for college-wide position for data science and analytics (2021, fall)
- Social Justice Research Forum (2020-present)
- College of Education Prevention Science committee (2020-present)
- Department of Special Education consultative committee for department chair (2020, spring)
- Faculty search committee for college-wide position in bilingual education (2019, fall)
- Faculty search committee for assistant professor position in STEM education (2018, fall)
- College of Education Research committee (2018-2020)
- Department of Special Education recruitment fellowship committee (2018-present)
- Faculty search committee for assistant professor position in Special Education (2017, fall)
- Department of Special Education selection committee for undergraduate scholarships (2017, May)
- Department of Special Education recruitment fellowship committee (2017, spring)
- Selection panel for 2017 NSF Research Training Program UT internal competition (2016, fall)
- Department of Special Education student fellowship committee (2016, fall)
- Faculty panelist at family weekend (2016, September)

- Focus group for UT faculty gender equity council (2016, March)
- Faculty search committee for open rank position in Special Education (2015, fall)
- Speaker and UT Student Council for Exceptional Children (2015, September)
- Department of Special Education selection committee for undergraduate scholarships (2015, May)
- Assistant professor dialogue series: Dean Iverson (2015, March)
- Panelist at College of Education *I Love Conferences* (2015, February)
- Department of Special Education consultative committee for department chair (2015, spring)
- College of Education Graduate Student Research Award selection committee (2015, January),
- Faculty search committee for assistant professor of early childhood position in Special Education (2014, fall)
- Panelist at College of Education *I Love Conferences* (2014, February)

University of Virginia, Charlottesville, VA

- Presenter at Education Council faculty jobs workshop (2012, December)
- Presenter at Education Council APA workshop (2012, November)
- Reviewer of graduate student travel stipends (2012, April)
- Speaker at Curry Research Conference (2012, January)

SERVICE: ADVISING AND STUDENTS

Doctoral advisees

- Gracie Douglas (2023-present)
- Kathleen Mason (2023-present)
- Katie Barnicle (2023-present)
 - Leaders Investigating Mathematics Evidence (LIME) Scholar (OSEP funded)
- Mackenna Vander Tuin (2023-present)
 - Leaders Investigating Mathematics Evidence (LIME) Scholar (OSEP funded)
- Alison Hardy (2022-present)
 - 2024 (Spring) Instructor of mathematics methods course at the University of Oklahoma
 - Leaders Investigating Mathematics Evidence (LIME) Scholar (OSEP funded)
- Jessica Mao (2022-present)
 - 2024 (Spring) Instructor of special education course at Texas State University
 - 2023 (Fall) Instructor of special education course at Texas State University
 - Leaders Investigating Mathematics Evidence (LIME) Scholar (OSEP funded)
- Danielle Lariviere (2021-present)
 - 2024 (Spring) Instructor of mathematics methods course at The University of Texas at Austin
 - 2023 (Fall) Instructor of mathematics methods course at the University of Maine
 - National Center on Leadership in Intensive Intervention (NCLII) Scholar (OSEP funded)
- Syeda Sharjina Akther (2021-present)
 - 2023 Mathematics Cognition and Learning Society (MCLS) Travel Award
- Tessa Arsenault (2020-present)
 - 2024 (Spring) Instructor of mathematics methods course at The University of Texas at Austin
 - 2023-2024 Division for Research Doctoral Student Scholar

- 2023 (Fall) Instructor of mathematics methods course at East Tennessee State University
- 2022-2023 College of Education Graduate Student Research Award
- 2022 (Fall) Instructor of mathematics methods course at University of Wisconsin—Lacrosse
- National Center on Leadership in Intensive Intervention (NCLII) Scholar (OSEP funded)
- Zhina Shen (2019-2023)
 - Director of Evaluation and Research at Innovative Learning Center (2024-present)
 - Program Evaluation Consultant for Joshua's Stage (2023)
 - Defended dissertation November 2023: *The effectiveness of concrete-representational-abstract integration framework within word-problem solving for students experiencing mathematics difficulty*
 - 2023 The University of Texas at Austin Graduate School Dissertation Fellowship
 - 2023 Division for Learning Disabilities Candace S. Bos Innovation grant
- Sarah Gorsky King (2021-2023)
 - 2024 Council for Exceptional Children, Division for Research, Student Research Award: Quantitative Design
 - 2024 (Spring) Instructor of college teaching course at The University of Texas at Austin
 - Research Associate at the Meadows Center for Preventing Educational Risk (2023-present)
 - Defended dissertation March 2023: *Impact of a culturally and linguistically responsive mathematics instructional module for pre-service teachers*
 - 2023 (Fall) Instructor of mathematics methods course at The University of Texas at Austin
 - 2022 (Fall) Instructor of mathematics methods course at University of Wisconsin—Lacrosse
 - 2022-2023 Division for Research Doctoral Student Scholar
 - 2022 (Spring) Instructor of mathematics methods course at The University of Texas at Austin
 - 2022 Texas Council for Learning Disabilities Mini-Grant Award
- Xin Lin (2018-2022)
 - Assistant Professor at the University of Macau (2022-present)
 - Defended dissertation April 2022: *Effectiveness and responsiveness of a fraction vocabulary intervention for students experiencing mathematics difficulty in Grade 4*
 - 2021-2022 University Graduate Continuing Fellowship
 - 2020-2021 Division for Research Doctoral Student Scholar
 - 2020 Division for Learning Disabilities Candace S. Bos Innovation grant
 - 2020-2021 University Graduate Continuing Fellowship
- Samantha Bos (2018-2022)
 - Research Associate at Gibson Consulting (2022-present)
 - Defended dissertation March 2022: *The impact of a mathematics workshop on mathematics teachers' knowledge and skills*
 - 2022 (Spring) Instructor of mathematics methods course at The University of Texas at Austin
 - 2021-2022 Division for Research Doctoral Student Scholar
 - 2019-2020 College of Education Graduate Student Research Award
- Brenda Zapparoli (2016-2020)
 - Defended dissertation December 2020: *Effects of a mathematics word problem intervention for English Learner students with mathematics difficulty*
- Le Tran Ozor (2015-2019)
 - Research Associate at The University of Texas at Austin (2019-present)

- Defended dissertation July 2019: *Increasing equity and access for ELs through IEPs: A professional development on preparing teachers to develop culturally and linguistically responsive levels of academic achievement and functional performance statements within Individualized Education Programs*
- Suzanne Forsyth (2015-2019)
 - Special Education Coordinator at Burleson-Milam Special Services (present)
 - Defended dissertation April 2019: *The effects of a teacher-led numeracy read-aloud routine on the expressive math-talk of at-risk preschoolers*
 - 2018-2019 University Graduate Continuing Fellowship
- Sarah Benz (2015-2018)
 - Research Associate at the American Institutes for Research (2018-present)
 - Defended dissertation April 2018: *The effect of behavior within a word-problem intervention student students with mathematical difficulties*
 - Published in *Remedial and Special Education* (Benz & Powell, 2021) as *The influence of behavior on performance within a word-problem intervention for students with mathematics difficulty*
- Melissa K. Driver (2011-2015); University of Virginia
 - Associate Professor at Kennesaw State University (2015-present)
 - 2016 Council for Exceptional Children, Division for Research, Student Research Award
 - Defended dissertation March 2015: *Word-problem instruction for English learners: A culturally and linguistically responsive approach*
 - Published in *Learning Disability Quarterly* (Driver & Powell, 2017) as *Culturally and linguistically responsive schema intervention: Improving word problem solving for English language learners with mathematics difficulty*

Post-Doctoral mentees

- Tasia Brafford (2021-2023)
 - Assistant Professor at Texas State University (2023-present)
 - Meadows Center for Preventing Educational Risk Post-Doctoral Fellow (IES funded)
- Genesis Arizmendi (2021-2023)
 - Assistant Professor at the University of Arizona (2023-present)
 - The University of Texas at Austin Provost's Early Career Fellows

Dissertation committees

- Tim Andress (2023-present)
- Erica Fry (2023-present)
- Tessa Arsenault (2023-present)
- Zhina Shen (2023-present)
- Sarah G. King (2022-2023)
- Jenna Gersib (2022-2023)
- Molly Oshinski (2022-present)
- Steven Maddox (2021-2022)
- Xin Lin (2021-2022)
- Samantha Bos (2021-2022)

- Brenda Zaparolli (2020)
- Amanda Martinez-Lincoln (2019)
- Suzanne Forsyth (2019)
- Le Tran (2019)
- Shih-Tui Wang (2019-2020)
- Sarah Benz (2018)
- Elizabeth Stevens (2018)
- Jihyun Lee (2017-2018)
- Garrett Roberts (2015-2016)
- Melodee Walker (2015-2016)
- Marcie Belfi (2015)
- Sarah Arden (2014-2015)
- Fangjuan (Vivian) Hou (2014-2015)

Research Mentoring (thesis) committees

- Danielle Lariviere (2023)
- Syeda Sharjina Akther (2023)
- Tessa Arsenault (2022)
- Jenna Gersib (2022)
- Sarah Gorsky King (2021)
- Zhina Shen (2021)
- Samantha E. Bos (2020)
- Xin Lin (2020)
- Zainab Unal (2020)
- Brenda Zaparolli (2019)
- Rene Grimes (2019)
- Maryam Nozari (2018)
- Amanda Martinez-Lincoln (2018)
- Shih-Tui Wang (2017)
- Sarah Benz (2017)
- Suzanne Forsyth (2017)
- Le Tran Ozor (2017)
- Jihyun Lee (2016)
- Phillip Capin (2016)
- Joseph Grubbs (2015)
- Laci Watkins (2015)
- Julie Martinez (2014)

Master's thesis advisee

- Steven Maddox (2017)

Master's thesis committee

- Lexy House (2015)

Master's advisees

- Emily Donnan (2017-2018)
- Linda Maher (2017-2019)
- Dana Rathbun (2017-2018)
- Peter Biggs (2016)
- Raymond Flores (2015-2017)
- Darielle Mitchell (2014-2015)

External Reviewer of dissertation

- Heather Douglas, Carleton University, Ottawa, Canada (2020, September)
- Muhammad Javed Aftab, University of the Punjab, Pakistan (2017, May)

SERVICE: OTHER

- Panel Member, Math Hub, Center on Reinventing Public Education (CRPE) (2024-present)
- Consultant, ServeMinnesota for K-3 Math program (2021, June)
- Consultant, ServeMinnesota for K-3 Math program (2020, February)
- National Center for Leadership in Intensive Intervention (2020-2024)
 - Admissions committee
 - Curriculum committee
- Consultant, *Measuring Early Mathematical Reasoning Skills* awarded by National Science Foundation to Southern Methodist University (2018, Spring)
- National Center for Leadership in Intensive Intervention (2015-2020)
- Panelist, Texas Association of Business, Austin, TX (2015, November)
- Presenter, Austin ISD Summer Institute, Austin, TX (2015, June)
- Presenter, Region 13 Summer Institute, Austin, TX (2015, June)
- Presenter, Middle School Matters Summer Institute, Austin, TX (2015, June)
- Panelist, National Academy of Education/Spencer Postdoctoral Fellowship Q&A for potential applicants, American Educational Research Association Annual Meeting, Chicago, IL (2015, April)

UNIVERSITY TEACHING

The University of Texas at Austin, Austin, TX

- SED 378T: Mathematics Methods – Part 1 (Spring 2023 – second half of semester)
- EDC 370E: Mathematics Methods – Part 2 (Fall 2022, 2021, 2020, 2018, 2017)
- SED 395D: Seminar in Mathematics (Spring 2022)
- SED 695A: Professional Seminar A (Fall 2021)
- SED 383: Intensive Mathematics Interventions for Students with Mathematics Disabilities and Difficulties (Spring 2019, 2018, 2017, 2016, 2015, 2014)
- SED 393: Applied Research in Special Education (Summer 2017)
- SED 395D: Seminar in Learning Disabilities (Spring 2017)
- EDC 370E: Mathematics Methods (2016, 2015, 2014)
- SED 383: Assessment in Special Education (Fall 2016)

- SED 372: Assessment of Individuals with Mild/Moderate Disabilities (Fall 2013)

University of Virginia, Charlottesville, VA

- EDIS 5140: Methods and collaboration in special education (Spring 2013, 2012)
- EDIS 5000: Exceptional learners (Fall 2012)
- EDIS 5060: Math for special and elementary education (Fall 2012, 2011; Summer 2013, 2012)
- EDIS 5320: Mathematics in elementary schools (Fall 2012, 2011)

Vanderbilt University, Nashville, TN

- SPED 2870: Accommodating academic diversity in grades K-3 (Spring 2011)
- SPED 3830: Advanced instructional principles and procedures in mathematics and learning strategies for students with disabilities (Fall 2010, 2009, 2008)
- SPED 3000: Education and psychology of exceptional learners (Summer 2008)

AWARDS

2024	Kirk Award for Outstanding Research Article Division for Learning Disabilities, Council for Exceptional Children
2022	Dean's Distinguished Research Award College of Education, The University of Texas at Austin
2019	Presidential Early Career Award for Scientists and Engineers (PECASE) Nominee from the U.S. Department of Education
2018	Distinguished Early Career Research Award Division for Research, Council for Exceptional Children
2016	Samuel A. Kirk Award, Best Practitioner Article in 2015 Division for Learning Disabilities, Council for Exceptional Children
2011	Early Career Publication Award Division for Research, Council for Exceptional Children
2010	Dissertation Award Division for Learning Disabilities, Council for Exceptional Children
2009	Outstanding Researcher Award (i.e., Dissertation Award) Council for Learning Disabilities
2009	Robert Gaylord-Ross Award for Excellence in Scholarly Writing Department of Special Education, Vanderbilt University
2009	Dick Shores Teacher Education Award Department of Special Education, Vanderbilt University

2005-2009 Predoctoral Fellowship
Institute of Education Sciences

MEDIA

Progressively Incorrect (2024, February)

[*Myths that undermine math teaching*](#)

More Math for More People (2023, October)

[*Where Joel and Misty begin a conversation with Dr. Sarah Powell about teaching word problem solving*](#)

Centering the Pendulum Podcast (2023, July)

[*The science of math, Part 1*](#)

The science of math, Part 2

The science of math, Part 3

The Science of Special Education Podcast (2023, January)

[*Science of math and common teaching myths*](#)

Progressively Incorrect (2022, September)

[*Myths that undermine math teaching*](#)

About, From, and With Podcast (2022, August)

[*Preparing faculty job applications*](#)

National Institutes of Health, Loan Repayment Program (2022, August)

Supporting the next generation of researchers (n = 609)

Clubhouse: Educational Diagnosticians (2022, June)

Efforts to reduce academic risk at the Meadows Center

PaTTAN Pod (2022, March)

[*The Science of Math*](#)

The Science of Math (2021, October)

[*What is the Science of Math?*](#)

Progress Center (2021, August)

[*Six key instructional practices for accelerating learning and promoting progress for students with disabilities \(n = 289\)*](#)

Good Day Austin (2021, June 30)

Discussion about STAAR mathematics scores in Texas

<https://www.fox7austin.com/video/950068>

Williams & Mary Training and Technical Assistance Center (2021, February)
[Word problems? No problem!](#)

Research to Practice (2021, January)
[Effects of a word-problem intervention on word-problem language features](#)

Global Math Department (2020, October)
[What works in math intervention](#)

Researchers and Teachers Connect (2019, December)
[Effective word-problem instruction](#)

Council for Exceptional Children and Institute of Education Sciences (2019, November)
[How to design and deliver effective math intervention](#) (n = 1,100)

The National Center for Intensive Intervention Webinar (2019, Summer)
[Make your course count: Preparing educators to support students with mathematics difficulty](#)

ChildNEXUS (2018, Fall)
[Important components of effective math intervention](#)

Council for Exceptional Children Podcast (2017, Fall)
[Instead of that, say this!](#)

National Center on Intensive Intervention (2016, Fall)
[Teaching counting instructional videos](#)

Council for Exceptional Children Webinar (2016, October)
[Calculation and word-problem interventions for elementary students with mathematics difficulty](#)

Mathematics Education Podcast (2015, May)
[Everybody counts, but usually just to 10!](#)

MEDIA MENTIONS AND INTERVIEWS

The74, February 20, 2024
Reading supports abound in schools, but effective math help much harder to find
<https://www.the74million.org/article/reading-supports-abound-in-schools-but-effective-math-help-much-harder-to-find/>

EduTopia, October 20, 2023
Should more time be spent learning math facts?
<https://www.edutopia.org/article/how-decreased-practice-time-plays-into-historic-math-declines/>

EdWeek, September 29, 2023

Do future teachers have math anxiety? Their university instructors think so

<https://www.edweek.org/teaching-learning/do-future-teachers-have-math-anxiety-their-university-instructors-think-so/2023/09>

EdWeek, September 28, 2023

Universities are teaching competing math philosophies to future teachers. Why that matters

<https://www.edweek.org/teaching-learning/universities-are-teaching-competing-math-philosophies-to-future-teachers-why-that-matters/2023/09>

EdWeek, September 27, 2023

Preparing math teachers: What's in the coursework?

<https://www.edweek.org/teaching-learning/preparing-math-teachers-whats-in-the-coursework/2023/09>

WBEZ Chicago, September 19, 2023

A South Side elementary school is a model for how CPS hopes to improve math performance

<https://www.wbez.org/stories/cps-math-scores-still-lag-pre-pandemic-levels-while-english-has-recovered-heres-a-model-cps-says-can-help/8d2b80dc-c53a-4f2c-897d-bc962353f8cb>

The74, September 19, 2023

As test scores crater, debate over whether there's a 'science' to math recovery

<https://www.the74million.org/article/as-test-scores-crater-debate-over-whether-theres-a-science-to-math-recovery/>

Voice of America, September 12, 2023

US schools help students behind in math

<https://learningenglish.voanews.com/a/us-schools-help-students-behind-in-math/7246248.html>

EdWeek, August 9, 2023

7 states now require math support for struggling students. Here's what's in the new laws.

<https://www.edweek.org/teaching-learning/7-states-now-require-math-support-for-struggling-students-heres-whats-in-the-new-laws/2023/08>

LA School Report, May 23, 2023

LAUSD considers expanding popular math program without clear evidence of effectiveness

<https://www.laschoolreport.com/lausd-considers-expanding-popular-math-program-without-clear-evidence-of-effectiveness/>

The Hechinger Report, May 8, 2023

Proof points: How a debate over the science of math could reignite the math wars

<https://hechingerreport.org/proof-points-how-a-debate-over-the-science-of-math-could-reignite-the-math-wars/>

EdWeek, May 1, 2023

Why word problems are such a struggle for students – and what teachers can do

<https://www.edweek.org/teaching-learning/why-word-problems-are-such-a-struggle-for-students-and-what-teachers-can-do/2023/05>

EdWeek, May 1, 2023

Dyscalculia and dyslexia: Reading disabilities offer insights for math support

<https://www.edweek.org/teaching-learning/dyscalculia-and-dyslexia-reading-disabilities-offer-insights-for-math-support/2023/05>

RESEARCH EXPERIENCE

Meta-Analysis Training Institute, 2022

Fellow, 2013-present

Meadows Center for Preventing Education Risk, Mathematics Institute, Austin, TX

Principal Investigator, 2011-2013

Curry School of Education, University of Virginia, Charlottesville, VA

Research Associate, 2009-2011

Department of Special Education, Vanderbilt University, Nashville, TN

Project Coordinator, 2005-2009

Department of Special Education, Vanderbilt University, Nashville, TN

Teacher II, 2002-2005

Department of Special Education, Vanderbilt University, Nashville, TN

Research Assistant, 2000-2001

Department of Special Education, Vanderbilt University, Nashville, TN

OTHER EDUCATIONAL EXPERIENCE

Board of Directors (2015-present)

Meadows Center for Preventing Educational Risk, Austin, TX

Task Force (2015)

National Science Foundation

- *Conceptualizing elementary mathematical writing: Implications for mathematics education stakeholders*, Storrs, CT

Expert Reviewer (2015)

Research in Mathematics Education, Southern Methodist University, Dallas, TX

- Reviewed survey of kindergarten teachers' mathematics instructional practices

Consultant (2014-present)

Middle School Matters Project, George W. Bush Institute, Dallas, TX

- On-site visits to middle schools in Pennsylvania, South Carolina, and Texas
- Conducted webinar on effective mathematics instruction
- Edited mathematics Field Guide

Consultant (2012-present)

American Institutes for Research, Washington, DC

- Provide professional development on data-based individualization and mathematics
- Created guides on counting, number combinations, and computation for the National Center on Intensive Intervention

External Reviewer (2011)

The University of Chicago School Mathematics Project, Chicago, IL

- Provided feedback on *Everyday Mathematics* (4th ed.) content for students with disabilities

Technical Review Committee Member (2009-present)

National Center for Intensive Intervention, Washington, DC

- Evaluate Tier 3 interventions in mathematics for a national intervention website

National Center on Response to Intervention, Washington, DC

- Evaluated Tier 2 and 3 interventions in reading and mathematics for a national RTI website

Consultant (2004-present)

- Provide workshops to school districts (over 100) across the country on progress monitoring, RTI, manipulatives and mathematics, and Math Peer Assisted-Learning Strategies (PALS)
- Presented internationally in Canada, England, and Iceland

Consultant (2004-2008)

American Institutes for Research, Washington, DC

- Created manuals and presentations on reading, math, writing, and spelling progress monitoring and RTI.
- Created math RTI case studies.

Consultant (2003)

Institute for the Development of Educational Achievement, Eugene, OR

- Created actuarial database of reading assessment instruments.

Consultant (2002)

Texas Center for Reading and Language Arts, Austin, TX

- Created math problem solving workshop for statewide teacher training.

Pre-First Teacher (2001-2002)

Akiva School, Nashville, TN

Student Teacher (1999)

Woodlawn Elementary School, Danville, KY

Counselor (1996-1999)

Ohio Wesleyan Junior League Gifted and Talented Camp, Delaware, OH

Counselor (1994-2002)

Muscular Dystrophy Camp, Ashley, OH

AFFILIATIONS

- Council for Exceptional Children (CEC)
 - Division for Learning Disabilities
 - Division for Research
- Professional teaching license (PreK-6) Commonwealth of Virginia (2001-2006)

Rolanda W. Baldwin

K-12 Math Education Professional

Phone: [REDACTED] @unbounded.org

I am a lifelong learner dedicated to continuous improvement, a proponent for equity in educational opportunities for all students, and a relationship builder with all stakeholders.

Education Professional Experience

Vice President, Program Design

Remote

UnboundEd

2020 - present

- Establish the vision, strategy, and goals that contribute to the design and development of UnboundEd programs and services focused on mathematics, science, and the UnboundEd Planning Process™ (UPP) programs implementation for schools, school system, and state leaders.
- Contribute to organizational strategy, cross-functional workstreams, and external partnerships.
- Serve as the subject matter expert on the successful implementation of mathematics programs that intersect with rigorous standards-aligned mathematics concepts and culturally relevant/responsive instruction.

Director, Mathematics

Remote

UnboundEd

2020

- Established and continually refined content development goals and processes that align with the UnboundEd vision, research base, and client needs.
- Ensured a quality professional development experience by aligning product and program outcomes with the impact and reach goals of UnboundEd.

Specialist, Mathematics

Remote

UnboundEd

2017 - 2020

- Leveraged math education research and best practices in adult learning to develop professional development content.
- Developed and piloted an “African American Male Achievement Toolkit”, designed to equip instructional coaches to support teachers in implementing research-based equity practices while enacting high-quality curriculum.
- Curated high-quality curriculum to ensure alignment of teacher enactment and intended outcomes of lessons.

Math Curriculum Coordinator

Greensboro, NC

Guilford County Schools

2014 - 2017

- Impacted the academic outcomes for over 17,000 students by supporting teachers, instructional coaches, and school administrators in 32 elementary, middle, and high schools with the emphasis on the 12 lowest performing schools through instructional coaching, data analysis, and delivery of professional development.
- Impacted the academic outcomes for over 30,000 students by developing district-level curriculum materials to support teachers at 24 middle and 24 high schools.

Educational Consultant

Winston-Salem, NC

ERG

2016 - 2018

- School level consultant to support middle grades 1st and 2nd year math and ELA teachers through learning walks and coaching feedback.

Fast Track Specialist
Greensboro, NC**North Carolina A&T State University**
2015 - 2023

- Designed and implemented a tutorial scope and sequence to prepare pre-service teachers to take the math sections of teaching licensure exams.

North Carolina Core Advocate
Remote**Student Achievement Partners**
2015 - 2016

- Served as a member of the NC Core Advocate Team to support teachers through professional development across the state of North Carolina during the transition to a college and career ready curriculum.

Freelance Developer
Greensboro, NC**Carson Dellosa Publishing**
2015 - 2016

- Created manuscripts, aligned to grade level math standards, for math workbooks within the guidelines of the publisher.

Middle School Math Curriculum Facilitator
High Point, NC**Guilford County Schools**
2013 - 2014

- Impacted the academic outcomes of over 400 students by supporting math teachers through instructional rounds, model lessons, and resource sharing,
- Developed professional learning communities through facilitation and coaching.

Dream Team Teacher
Remote**LearnZillion**
2012

- Unpacked common core math standards to develop a series of short video lessons that were published on LearnZillion.com.

Secondary Mathematics Teacher (grades 6 -12)
Greensboro, NC**Guilford County Schools**
2004 - 2013

- Identified as a highly effective teacher (Level 3 through Level 5) as measured by Value Added Data.
- Successfully moved Algebra 1 proficiency scores from 28% to over 50% as a member of the Algebra 1 teacher team.
- Lead Algebra 2 common core standards implementation planning for the high school math department.

Other Professional ExperienceInformation Systems – Supply Chain, Technical Support
Greensboro, NC**VF Services**
2004Programmer Analyst – Quality Assurance and Application Testing
Greensboro, NC**VF Services**
2000 - 2004Product Engineer – Electronic Development
Greensboro, NC**Volvo Trucks North America**
1997 – 2000Algorithm Engineer

Milford, MI

**General Motors Corporation,
Delphi Chassis Systems Division**
1996 - 1997**Publications**

Baldwin, R., Jr., Cintron, S., Coe, P., Sebelski, S., *Equitable Mathematics instruction: enacting instruction that is Grade-Level, engaging, affirming, and meaningful*. UnboundEd Learning, Inc. 2021.

Baldwin, Rolanda W. *Spectrum Critical Thinking for Math, Grade 6*. Greensboro, NC: Carson-Dellosa, 2017. Print.

Baldwin, Rolanda W. *Spectrum Critical Thinking for Math, Grade 7*. Greensboro, NC: Carson-Dellosa, 2017. Print.

Baldwin, Rolanda W. *Spectrum Critical Thinking for Math, Grade 8*. Greensboro, NC: Carson-Dellosa, 2017. Print.

Baldwin, Rolanda. *Math, Grade 8 Interactive Notebooks*. Carson-Dellosa Pub Co, 2016. Print.

Presentations

Eliminating the Black Unicorn, April 2024,
Building Engineers in K–5 Classrooms 2024 Conference, Raleigh, NC

Shifting Mindsets in Service of Students, October 2023,
Washington Unified School District, West Sacramento, CA

Eliminating the Black Unicorn, August 2023,
California Montessori Project, Sacramento, CA

Eliminating the Black Science Unicorn, December 2022,
Portland Public Schools, Virtual

Humanizing Students So That Math Teaching Can Be Ambitious, November 2022,
Arkansas Council of Teachers of Mathematics, Conway, AR

But What Does Equity Look Like, October 2022,
NC Association of Federal Education Programs Conference, Greensboro, NC

But What Does Equity Look Like, May 2022,
Equity Conference: Equity is Love in Action, San Diego, CA

Eliminating the Black Unicorn, September 2020,
CCSSO Math Collaborative Meeting, Virtual

The Intersection of Equity and the Mathematics Standards, December 2019,
Learning Forward, St. Louis, MO

African American Math Achievement Toolkit: Supporting Equity-Based Instructional Practices,
November 2019, NABSE, Dallas, TX

Lessons Learned on the Intersection of Equity and the Standards, November 2019,
NCCTM, Greensboro, NC

Leveling Up with Math Rigor, Innovative Public Schools Top School Convening,
May 2019, Los Angeles, CA

Lessons Learned on the Intersection of Equity and the Standards, April 2019,
NCTM, San Diego, CA

African American Math Achievement Toolkit, October 2018,
NCCTM, Greensboro, NC

Creating Professional Learning Experiences to Build Teacher Content Knowledge,
April 2018, NCSM, Washington DC

Interactive Notebooks with Rigor, October 2016,
NCCTM, Greensboro, NC

Education and Credentials

Regional Alternative Licensing Center – North Carolina
North Carolina Mathematics (grades 6 – 12) Teaching Certification, 2007

North Carolina Agricultural and Technical State University – Greensboro, NC
27 hours towards M.S., Electrical Engineering, 1996

North Carolina Agricultural and Technical State University – Greensboro, NC
B.S., Electrical Engineering, 1994

North Carolina School of Science and Mathematics – Durham, NC
Diploma, 1990



Marguerite Roza, Ph.D.
Director, Edunomics Lab and Research Professor,
Georgetown University
Subject Matter Expert

Years of Experience

25+ years

Key Qualifications

- Research professor and director of leading education finance center, conducts research and analysis exploring and modeling fiscal and economic aspects of public education policy, productivity in education, financial data and cost modeling for strategy, policy analysis, and economics of education. Research has stimulated and informed fiscal policy reform in many urban districts, some states, and at the federal level.
- Provides **capacity-building** and technical assistance support to national organizations and **state and local school systems**, improving their ability to use data in financial decision-making to promote equity, productivity, and innovation to benefit students.
- Launched and leads the Certificate in Education Finance at Georgetown University's McCourt School of Public Policy, with two annual cohorts plus custom placed-based cohorts. **Provides trainings** for state legislators, district leaders, school board members, practitioner associations, and others at all levels of the education system to equip them with practical skills in strategic fiscal management, policy analysis, and leadership.

Key Skills

Project Management: Client Relationships, Project Development and Design

Evaluation & Mixed-Method Research: Ed Finance Policy and Practice Outcomes, Ed Equity

Data Collection: Data Assembly and Cleaning, Capacity Building for Data Transparency

Training & Technical Assistance: Policy Analysis, Systems Change, Stakeholder Engagement

Education

Ph.D. and Masters in Education, University of Washington, (1992-1995)

B.S. Math, Duke University, Economics Emphasis (1984-1988)

Certifications/Licensures

Teacher's Certificate in Secondary Mathematics

Employment History

Georgetown University, Washington, DC | Director, Edunomics Lab, 2012-present; Research Professor, McCourt School of Public Policy, 2012-present; Instructor, Certificate in Education Finance, 2018-present

Bill & Melinda Gates Foundation, Seattle, WA | Senior Economic and Data Advisor, 2010-11

University of Washington, Seattle, WA | Senior Scholar, Center on Reinventing Public Education, 2003-12; Research Associate Professor, College of Education, 2007-12; Research Assistant Professor, Daniel J. Evans School of Public Affairs, 2003-07

Education Development Center, Inc., Waltham, MA | Senior R&D Associate, 1995-98

Expertise

Capacity Building through Technical Assistance

- Dr. Roza **leads two national education policy maker networks of state- and district-level finance leaders**—the [District Finance Network](#) and the [Financial Decision-Making Working Group](#) (FiDWiG)—providing technical assistance and facilitating research on student-based allocation, financial transparency, return on investment, and continuous improvement.
- Dr. Roza **provides specialized research and technical assistance to national organizations and state and local education systems**, improving the use of data in financial decision-making to promote equity, productivity, and innovation to improve student outcomes.
- Dr. Roza and her team **provide trainings for state legislators, district leaders, school board members, and others at all levels of the ed system** to equip them with practical skills in strategic fiscal management, policy analysis, and leadership.

Developing Products and Tools

- Dr. Roza leads the work of **building data systems and tools to inform the work of leaders striving for improved equity and productivity**. These include NERD\$ school-by-school spending dataset and the School Spending and Outcomes Snapshot tool (SSOS), enabling comparison of student outcomes alongside spending; the staffing and enrollment charts; and the state funding formula decision tree (promoting equitable state allocation of resources).
- Dr. Roza's center has **led the field in capturing, analyzing, and sharing timely data on federal relief spending** to inform financial decision-making, along with tools to assess ROI (e.g., The Grid).
- **Roza's center builds tools with end users in mind**. Designing visualizations and other tools around user needs can make data accessible, actionable, and impactful. Data visualizations created for SSOS drew on more than two years of pilot efforts with 26 school districts to find what works best to drive strategic conversations.

Communication and Collaboration

- Dr. Roza regularly engages with education leaders to keep them focused on what matters: Making equitable, student-centered, and sustainable financial decisions that support improved outcomes for students who need it the most.
- Dr. Roza has conducted ed finance messaging research, and designs and leads communications activities on ways to engage audiences and build trust.

- The center's communications effectively target findings and implications to key audiences who can act on behalf of students, and to those who work to keep the system accountable, such as media and advocacy groups. These efforts include timely briefs and commentaries, a 30-minute webinar series, and newsletters with regular readership of over 10,000.
- The center successfully translates data and findings to make them accessible for end users and useful for research, policy, and practice, and **builds awareness and strategic use of data and tools** through its national networks, short webinars, and trainings and workshops.

Honors and Awards

"Most Actionable Tools & Research," ESSER Expenditure Dashboard, PIE Network, 2023
Future of K-12 Education Data Design Challenge Winner: "How public ed can use productivity metrics to drive continuous improvement, U.S. Chamber of Commerce, 2023
"Most Actionable Research," Learning Loss Calculator, PIE, Network 2022

Professional Affiliations

Teaching Faculty, Leadership Institute of Nevada (2012-current)
Senior Research Affiliate, Center on Reinventing Public Education (2003 - 2020)
Senior Fellow, Brookings Institute 2010-17

Publications/Technical Reports

Books and Chapters

Roza, M. "How the 'Would You Rather' Test Can Help with School Finance Decisions." In Getting the Most Bang for the Education Buck, ed. F. Hess and B. Wright. Teachers College Press, 2020.

Roza, M. "How current governance of education inhibits better uses of resources." In Ed Governance for the Twenty-First Century, ed. P. McGuinn and P. Manna, Brookings Institute Press, 2012.

Roza, M. Education Economics: Where Do School Funds Go? Urban Institute Press, 2010.

Roza, M. "Now is a great time to compute the per-unit cost of everything in education." In Stretching the School Dollar, ed. F. Hess and E. Osberg. Harvard Institute Press, 2010.

Roza, M. "How Districts Shortchange Low-Income and Minority Students." In The Education Trust Funding Gaps, 2006. The Education Trust, 2006.

Roza, M. and Hill, P. "How Can Anyone Say What's Adequate if Nobody Knows How Money Is Spent Now?" In Courting Failure: How School Finance Lawsuits Exploit Judges' Good Intentions and Harm Our Children, ed. E. Hanushek. Hoover Press, 2006.

Roza, M. and Hill, P. "How Within-District Spending Inequities Help Some Schools to Fail." In Brookings Papers on Education Policy 2004, ed. D. Ravitch. Brookings Institution Press, 2004.

Roza, M. "Rethinking Data Capacity." In Making School Reform Work: New Partnerships for Real Change, ed. Paul Hill and James Harvey. Brookings Institution Press, 2004.

Selected Journal Articles

Roza, M. and Knight, D. "Behold the Role of the District in Education Finance." Peabody Journal of Education, 97:4, 391-394 (September 2022).

Jarmolowski, H., Aldeman, C. and Roza, M. “Do Districts Using Weighted Student Funding Formulas Deliver More Dollars to Low-income Students?” Peabody Journal of Education, 97:4, 427-438 (September 2022).

Roza, M., K. Hagan, and L. Anderson. “Variation Is the Norm: A Landscape Analysis of Weighted Student Funding Implementation.” Public Budgeting & Finance (2021).

Fullerton, J. and M. Roza. “Funding Phantom Students.” Education Next (Summer 2013): 9-16.

Timar and Roza (2010). A False Dilemma: Should decisions about education resource use be made at the state or local level? American Journal of Education 116 (May 2010).

Roza (2009). Breaking down school budgets: Following the dollars into the classroom. Education Next (Summer 2009).

Roza, M. and Swartz, C. (2007). School Spending Profiles: A Framework to Enlighten Resource Allocation Decisions. Public Budgeting and Finance. Spring 2007. V. 27, n. 1; pp. 69-85.

Miles, K. H. and Roza, M. (2006). Understanding Student-Weighted Allocation as a Means to Greater School Resource Equity. Peabody Journal of Education. V. 81, n. 3; pp. 39-62.

Selected Research and Technical Reports

Anderson, L., Jarmolowski, H., Roza, M., and Swanson, J. (2022). Leading Thoughtful Conversations On Resource Equity Using School-By-School Spending Data. National Comprehensive Center.

Roza, M. (2020). The Big Bet On Adding Staff To Improve Schools Is Breaking The Bank, Hoover Education Success Initiative.

Roza, M. (2019). Leaders Ignored Teacher Pension Debt. Now There’s Less Money For Teacher Salaries And Students. Edunomics Lab.

Roza, M. (2019). The “Would You Rather?” Test, American Enterprise Institute & Fordham Institute.

Roza, M. (2019). A Guide For SEA-Led Resource Allocation Reviews, Building State Capacity & Productivity Center.

Roza, M. (2019). Funding for Students’ Sake: How to Stop Financing Tomorrow’s Schools Based on Yesterday’s Priorities. Edunomics Lab.

Roza, M. and Hagan, K. (2018). Interstate Financial Reporting, Edunomics Lab.

Roza, M., Coughlin, T. and Anderson, L. (2018). Taking Stock of California’s Weighted Student Funding Overhaul: What Have Districts Done with Their Spending Flexibility? Edunomics Lab.

Roza, M., Coughlin, T. and Anderson, L. (2018). Did Districts Concentrate New State Money on Highest-Needs Schools? Answer: It Depends on the District. Edunomics Lab.

Derby, E. and Roza, M. (2018). California’s Weighted Student Funding Formula: Does it Hep Money Matter More? Edunomics Lab.

Roza, M. and Hagan, K. (2018). Four Approaches to Assigning Costs to Central Level and School Level When Calculating Per Pupil Expenditures, Building State Capacity & Productivity Center.

Roza, M. and Heyward, G. (2015). Highly Productive Rural Districts: What is the Secret Sauce. Rural Opportunities Consortium of Idaho.

Other publications

Roza, M. and Cicco, M. California’s school funding crisis has arrived. Here’s how leaders can dig out. San Francisco Standard (May 2024).

Roza, M. and Dhammani, A. Closing schools: How much money does it save, and is it worth it? EdSource (March 2024).

Roza, M. and Anderson, L. School Boards Face Their Most Difficult Budget Season Ever. The 74 (February 2024).

Roza, M. and Silberstein, K. "The ESSER fiscal cliff will have serious implications for student equity." Brookings Chalkboard (2023).

Anderson, L., Dhammani, A., Silberstein, K., Swanson, J., and Roza, M. "Recipe For High-Impact Research." Inside IES Research. 2023

Silberstein, K. and Roza, M. "The Massive ESSER Experiment: Here's what we're learning." Education Next (April 2023).

Roza, M. "The Stakes Are Only Getting Higher for Pandemic School Aid Spending." *Forbes* (February 2023).

Roza, M. and Aldeman, C. "Public Education Missed the Data Revolution. It's Time to Catch Up." The Hill (October 2022).

Roza, M. "What Goes Wrong When Some School Board Members Don't Understand District Finances?" *Forbes* (July 2022).

Roza, M. and Silberstein, K. "A Year Ago, School Districts Got A Windfall Of Pandemic Aid. How's That Going?" Brookings Brown Center Chalkboard (March 2022).

Roza, M. "Setting Student Progress As A North Star Would Be A Game Changer." The 74 (February 2022).

Aldeman, C. and Roza, M. "Maintenance Of Equity: A New Provision With Big Implications For District Budgeting." Education Next (August 2021).

Presentations

Roza, M. (2023, June). How public ed can use productivity metrics to drive continuous improvement. US Chamber/Future of Data Working Group. Washington, DC.

Roza, M. (2023, June). Financial Forecast = Wild Ride Ahead. Indiana School Boards Association.

Roza, M. (2023, May). Beyond Boosting Teacher Pay: Policy Levers to Strengthen the Teaching Profession. Reagan Institute Summit on Education. Washington, DC.

Roza, M. (2023, February). The Fiscal Cliff Coming to a District Near You. Harvard Program on Policy & Education Governance Colloquium.

Roza, M. (2023, February). Financial Outlook for State and District Budgets. PIE Network. Virtual.

Roza, M. (2023, January). The financial forecast is in! School district budgets are headed for a wild ride. National School Boards Association.

Roza, M. (2022, November). Funding for Education: Forecasting education spending in uncertain times. NCSL Basecamp.

Roza, M. (2022, October). Perfect Storm for District Finances. PIE Network Summit. NYC, NY.

Roza, M. (2022, October). ESSER Tracking and Advocacy. PIE Network. Virtual.

Roza, M. (2022, October). Forecasting Education Spending in Uncertain Times. NCSL.

Roza, M. (2022, July). Ed Finance Is Having A Moment. AASA/ASBO advocacy conference. Washington, DC.

David Donaldson

████████████████████@gmail.com

EDUCATION EXPERIENCE

Harvard Graduate School of Education; Cambridge, Massachusetts 2011
Master of Education in Education Policy and Management (EPM)

The Johns Hopkins University; Baltimore, Maryland 2010
Master of Arts in Teaching

Eastern Michigan University; Ypsilanti, Michigan 2007
Bachelor of Science in Language, Literature and Writing

WORK EXPERIENCE

National Center for Grow Your Own; Plymouth, Michigan

Founder and Managing Partner 2021-Present

- Lead the National Registered Apprenticeship in Teaching Network with 39 states, plus Washington D.C., participating
- Support multiple states, school districts and educator preparation providers to either launch or expand Grow Your Own and/or registered apprenticeships in teaching
- National presenter having spoken at conferences or webinars hosted by CCSSO, AAEE, Council of State Governments, National Association of State Budget Officials, Pathways Alliance and more
- Work has been featured in The Washington Post, PBS NewsHour, Education Week, K12 Dive and The 74 Million

Tennessee Department of Education; Nashville, Tennessee

Chief of Human Capital 2019-2021

- Direct report to the Commissioner, serve on cabinet and act as liaison to superintendents
- Led the application process to the U.S. Department of Labor to establish the occupation of a K-12 teacher to be eligible for registered apprenticeship – first in the nation to do so
- Oversee all human resources functions for 1,400 staff members within the department
- Rated #1 state in the country for prioritizing educator diversity and equity by The Education Trust
- Over 50% of new hires have been people of color; managing a team of 35 and \$11MM+ budget
- Launched Principal Supervisor Network (largest in the country with 25 participants amongst 16 districts), Aspiring Assistant Principal Network (over 300 participants earning their master's degree for free), Diverse Leader Network (110+ participants in two cohorts) and redesigned Rural Principal Network (over 125 participants in three cohorts)
- Launched "Grow Your Own" program with 63 districts and 14 education preparation providers resulting in 670+ future educators who will become a teacher, tuition-free, while being paid to do so, serves in a multi-year residency and ensures dual certification in special education or English as a second language
- Offered over 5,000+ free additional endorsements for Tennessee teachers in special education and English as a second language via partnerships with multiple EPPs to adapt their programs to be online and asynchronous
- Launched TN Teacher Job Connect and TN Educator Job Board which provided districts with 2,000 candidates looking for employment opportunities and had over 100 districts share job postings for hard to staff positions
- Over 38,000 licensure transactions processed in 2020, with 91% completed in 21 business days
- Lowered the amount of teaching vacancies within the state during a pandemic

Superintendent Support Services; Brooklyn, New York

Founder/Independent Education Consultant 2018-2019

- Civic Builders - nonprofit that focuses on finance, development and management of new school construction and renovations

- Serving in a temporary Chief of Staff/Chief Operating Officer type role while an executive search firm was being

conducted

- UP Education Network - charter management company in Massachusetts (6 schools, 3,000 students, 400 staff)
 - Executive and school-based talent recruitment
 - Internal and external communications strategy and drafting
- Braven - nonprofit focused on the education-to-employment gap with a focus on first-generation college graduates
 - Talent recruitment support provided for multiple open positions as organization expands

Detroit Public Schools Community District; Detroit, Michigan

Senior Executive Director of Talent and Human Resources

2017

- Returned to District under new superintendent and hired over 300 teachers in first two months
- Revised corrective discipline guidance and streamlined employee misconduct system for principals
- Overhauled Human Resources team to have individual managers responsible for serving all staffing needs on a principal's budget; previously managers were responsible for only certain types of positions (i.e. clericals, special education)
- Developed collaborative and positive working relationship with multiple unions including the Detroit Federation of Teacher and Organization of School Administrators and Supervisors (Central Office Union)

Education Achievement Authority; Detroit, Michigan

Associate Chancellor

2014-2017

- Designed EAA's strategic plan which began implementation in the 2015-16 school year
- Moved Teacher Incentive Fund (TIF) grant out of at-risk status and manage the program (over \$16 million)
- Managed external funding (U.S. Department of Education, Bloomberg, Broad, Robertson, Kellogg etc.) and vendor (TNTP, Ithaka S + R, Kitamba) relationships and provided regular grant programmatic reporting
- Oversaw talent and human resources, responsible for selection of all staff and redesign of evaluation system
- During transitional period, oversaw on interim basis, legal and data departments
- First hire of Veronica Conforme, Chancellor of the EAA and advise her on all matters

Detroit Public Schools; Detroit, Michigan

Principal of the Detroit Institute of Technology at Cody High School

2013-2014

- Conducted needs analysis and made necessary cuts to meet a 27% budget reduction (\$750,000).
- Scored 4 or higher (out of 5) on district-wide family survey on student safety, satisfaction with program offerings, school's effort to engage families, and customer service
- Instituted inclusion programming and co-teaching model to serve our students with disabilities(42%)
- Negotiated with union committee to increase instructional time during school day

New York City Department of Education; New York, New York

Chief of Staff – Business Services (Office of School Support)

2011-2013

- Supported the Executive Director on all matters that include school budgets, human resources and grants management for 1,535 schools.
- Led process for the FEMA reimbursement of schools (60+) damaged by Hurricane Sandy
- Managed 20+ physical moves and coordinated 186 power outage responses as part of the Hurricane Sandy "War Room" which relocated over 70,000 students within 72 hours
- Oversaw register review reporting to our clusters in order to right-size school staff and budgets

Baltimore City Public Schools via Teach For America; Baltimore, Maryland

9th and 10th Grade English Teacher and Baseball Coach

2008-2010

- Partnered with the *Baltimore Sun* to allow students to contribute to the online education blog
- Profiled in the *New York Times* on January 4, 2010 as part of a day in the life of a teacher

Cecelia Leong

A [REDACTED]

Phone: [REDACTED]

[REDACTED] ttendanceworks.org

Experience:

Attendance Works, Alameda, CA

9-2011 – present

Attendance Works is a national and state initiative that advances student success by closing equity gaps through reducing chronic absence. We focus on tracking chronic absence, defined as missing 10% of the school year for any reason, as a metric that is associated with poor student outcomes such as inability to read proficiently by third grade, course failure in sixth grade and dropout in high school.

As Vice President of Programs, my responsibilities include working closely with the Executive Director of Attendance Works and senior leadership team to define strategy, identify emerging technical assistance needs and develop new products to equip educators and community agencies with the tools they need to reduce chronic absence in their communities.

In addition, I oversee our fee-for-service contracts and professional development offerings for policy makers and practitioners interested in what works in reducing chronic absenteeism. During the pandemic, lead the team to adapt and expand our in-person training for virtual settings.

Independent Consultant, Alameda, CA

5/06 – 6/13

As a qualitative researcher, worked with foundations, evaluation firms, research organizations and non-profits to identify and document innovative and effective practices in serving and educating children and families. Frequent contributor to Pivot Learning Partners' materials on school district innovations, including *Lessons Learned in Systemic District Reform*, a study of four districts that are building aligned instructional systems to close the achievement gap for Black and Latino students. Developed case studies for district leaders to use in honing their strategic thinking. Policy areas of interest are pre-K-12 district reforms, early childhood and family support.

Pivot Learning Partners, San Francisco CA

2/05 – 4/06

(formerly known as *Springboard Schools* and the *Bay Area School Reform Collaborative*)

Pivot Learning Partners is dedicated to helping California schools improve student learning, raise test scores and close the achievement gap. As a Researcher, reported to the Director of Policy, conducted site visits in study of school districts closing the achievement gap. Under the Director of Research, wrote case studies and contributed to *Minding the Gap*, which highlights effective district practices in closing the achievement gap for English Learners and minority children.

Children's Advocate Newsmagazine, Oakland, CA

9/04 – 7/09

As a freelance writer, covered major issues affecting young children and families in California. Won awards for two series--one on universal preschool, *Ready for School in the U.S.* and the second on *Promoting Positive Behavior*.

California Tomorrow, Oakland CA

12/91 – 8/96

California Tomorrow is a non-profit organization dedicated to building a strong multi-racial society that is equitable for everyone. Using a combination of research, technical assistance and consultation, coalition-building and advocacy, California Tomorrow helps practitioners, schools and other family-serving institutions to develop and use policies and practices which advance equal opportunity and promote the healthy development of children, youth and families in California's increasingly diverse society.

Over the course of five years, took on increasing levels of responsibility and roles within the organization:

- Began at Associate level on the Collaborative Services for Diverse Communities Project. Initial work included staffing a clearinghouse of resources in integrated services programs which provided information on innovative programs within California and various other states. Played key role in expanding state-wide network of over one hundred technical assistance providers and consultants at critical point in the expansion of school-linked services programs in California schools.
- Worked with a team on two-year study to map collaborative services programs state-wide. Including results of a state-wide survey of collaborative programs and sites visits, this culminated in publication of *Drawing Strength from Diversity* which highlighted promising practices for serving culturally and linguistically different communities.
- As Project Coordinator, worked closely with Co-Director on project design, fundraising, grant writing and reports. Hired and directed consulting teams for six collaborative programs in order to shape innovative strategies for providing technical assistance.

Also did contract work as part of project. Consultant to San Francisco Foundation's Lifeline Initiative, San Francisco Unified School District Healthy Start Office and the California Policy Academy.

Heidrick and Struggles, Chicago, IL

9/87 – 6/89

Heidrick and Struggles is a top executive search firm with thirteen offices world-wide. As Research Associate, worked closely with other members of research staff to devise search strategies, target companies in various industries, and identify and screen candidates who met job specifications. Research process included working closely with consultants and partners, extensive library research, phone work, verifying credentials, utilizing in-house databases and monitoring business trends.

California Office of the Legislative Analyst, Sacramento, CA

Summer 1990

The role of the Legislative Analyst's Office is to provide non-partisan policy analysis to the California State Legislature. As Program Analyst, analyzed impact of demographic changes on California state budget.

Education:

University of California at Berkeley, Goldman School of Public Policy. Masters in Public Policy, 1991.

Harvard and Radcliffe Colleges, Harvard University, B.A., 1987

Whitney Young Magnet High School, Chicago, IL, 1983

Awards:

Friend of California Association of Supervisors of Child Welfare and Attendance, 2018

Alfred P. Sloan Fellow, 1989

Recent Publications:

Chang, Hedy N. and Cecelia Leong, *Missing More Than School: Reducing Chronic Absence for American Indian and Alaska Native Students*, WestED Western Educational Equity Assistance Center, May 2024

Chang, Hedy N., Cecelia Leong, Gisela Ariza, Maria Casey and Helen Duff, *Quick Start Guide for Districts to Improve Attendance*, WestED Western Educational Equity Assistance Center, July 2023

Chang, Hedy N. and Cecelia Leong, *Measuring Daily Attendance During Covid-10*, Policy Analysis for California Education, August 4, 2020


Chang, Hedy N. and Cecelia Leong, *A Tiered Approach to Ensuring Students are Present, Engaged and Supported in the 2020-21 School Year*, Policy Analysis for California Education, September 15, 2020

Board Memberships:

California State Attendance Review Board

References:

Available upon request.

a@newamerica.org
Washington, D.C. Metro Area

AMAYA GARCIA

CAREER HISTORY @ NEW AMERICA – Washington, D.C.

Director – PreK-12 Research and Practice • Full-time • November 2023 – present

- Influential and widely-cited thought leader in field for Grow Your Own (GYO) Educator Program; conduct and publish comprehensive research analysis to inform national engagement, advocacy, policy initiatives, and further research.
- Spearhead GYO Educator National Network to inspire and guide forward-thinking agendas to support education policy, strengthen local programming to secure key resources, share best practices, and implement strategies to address challenges.
- Develop and craft strategy for English Learner (EL) program to ensure coverage on exigent issues.
- Participate in interviews, scholar panels, and research conferences to showcase analysis on education policy, EL policy, teacher workforce retention concerns, and avenues to recruit diverse candidates with an overarching goal to secure critical allies.
- Serve on advisory boards and working groups related to teacher workforce issues.
- Work across sub-teams to promote alignment between content areas such as early childhood education, K-12 education, and workforce development.
- Cultivate partnerships to build strategies in alliance with external experts on publications, convenings, and strategy.
- Drive development of funding proposals and maintain relationships with funders to stimulate steady financial backing.
- Manage and mentor junior staff by providing writing, editing, and project delegation to encourage professional development and skill refinement.
- Serve as subject-matter expertise for Educator Registered Apprenticeship Intermediary.

Deputy Director – PreK-12 Division • Full-time • January 2018 – present

- Developed funding proposals and managed relationships with funders.
- Managed junior staff.
- Provided writing, editing and project support to colleagues.
- Coordinated and collaborated with external experts on publications, convenings and strategy.
- Conducted comprehensive research on Grow Your Own Educator programs.
- Founded and led Grow Your Own Educator National Network.
- Developed and executed strategy for English Learner program.

- Participated in interviews, panels, and research conferences to offer analysis on teacher workforce issues and English learner policy.

Senior Researcher – PreK-12 Division • Full-time • April 2016 – January 2018

- Researched, analyzed, and produced publications and reports on GYO teacher preparation programs to advance objectives.
- Advocated for and secured grant funding to support continued research and policy initiatives on GYO and EL programs.
- Developed external partnerships as force multipliers to share common goals and disseminate research findings.
- Proposed, organized, and assembled national convening events to highlight research findings on dual language learners (DLL).
- Planned, coordinated, and conducted focus groups across five cities to solicit interest and gain momentum on policy goals.

Policy Analyst – PreK-12 Division • Full-time • December 2014 – April 2016

- Researched current issues and themes related to educational adaptations for DLLs and ELs.
- Conducted in-depth profiles of school districts with approaches to EL education, then analyzed and published results.
- Advised policymakers on effective policies for ELs, inspiring and influencing future proposals and implementations.
- Proposed, drafted, and published 100+ blog posts to highlight policies, research, and practice related to ELs.

EDUCATION

Master of Public Policy, University of Maryland - College Park • 2013

Master of Arts, Cognitive Studies in Education, Teachers College, Columbia University • 2008

Bachelor of Arts, English and Psychology, University of Iowa • 2002

SELECTED PROFESSIONAL PUBLICATIONS

- *Exploring Paraprofessional Requirements across the 50 States and DC*. New America (Lead Author; 2023)
- *Grow Your Own Educators: A Toolkit for Program Design and Development*. New America (Lead Author, 2022)
- *Kennedy Children's Center Grows Its Own Special Education Teacher Workforce*. New America (Lead Author; 2022)
- "Plugging the Leaks: Washington's Policy Approach to Strengthening Latinx Teacher Pipeline." In C. Gist and T.J. Bristol (Eds.) *Handbook of Research on Teachers of Color & Indigenous Teachers*. American Educational Research Assoc. (Lead Author; 2022)
- "An Essential but Overlooked Workforce: Elevating the Need to Investigate the Career Development of Paraeducators."

Journal of Career Development 49(5): 1039-1047 (Co-Author; 2022 and Co-Editor of Special Issue)

- *Preparing Pre-K Teachers: Policy Considerations and Strategies*. The State Education Standard 22(3): 50-54 (Lead Author; 2022)
- *Grow Your Own Teachers: A 50-State Scan of Policies and Programs*. New America (Lead Author; 2020)
- *Developing a Bilingual Associate Degree for Spanish Speaking Early Childhood Educators*. New America (Lead Author; 2020)
- *Mississippi's Multifaceted Approach to Tackling Teacher Shortages*. New America (Lead Author; 2020)
- *Chicago's Bilingual Teacher Residency: A Partnership to Strengthen the Teacher Pipeline*. New America (Lead Author; 2019)
- "WA State Policy Spotlight: Multifaceted Approach to GYO Pathways." *Teacher Education Quarterly* 46, 69-78 (Lead Author; 2019)
- *Building a Bilingual Teacher Pipeline: Bilingual Teacher Fellows at Highline Public Schools*. New America (Lead Author; 2017)
- *Multilingual Paraprofessionals Speak About Barriers to Entering Profession*. New America (Co-Author; 2017)
- *Multilingual Paraprofessionals: An Untapped Resource for Supporting American Pluralism*. New America (Co-Author; 2016)

COMMUNITY ENGAGEMENTS

- Member: Advance CTE Diversifying the CTE Workforce Shared Solutions Workgroup • April 2023 - December 2023
- Advisory Board Member: National Center for Grow Your Own • 2021 – present.
- Parent Member: DC State Early Childhood Development Coordinating Council • 2021 – present
- Member: DC State Title III Advisory Committee • 2017 – 2019
- Peer Reviewer: National Professional Development Program, Title III • 2017

LANGUAGE SKILLS

- Spanish – Advanced Proficiency

Nancy J. Nelson, Ph.D., NCSP

Boston University

 [u.edu](#)**EDUCATION**

Ph.D.	School Psychology University of Oregon, Eugene, Oregon	June 2011
M.A.	Special Education San Francisco State University, San Francisco, California	May 2006
B.A.	Psychology; Spanish Minor Willamette University, Salem, Oregon <i>Ford Scholar, Ford Family Foundation</i>	May 2002

Professional Licenses

Nationally Certified School Psychologist (NCSP), Certification Number: 42652	2012
Preliminary School Psychologist, Oregon, 129034	2012
Initial II Teaching, Oregon	2012
Endorsements: Special Education, English for Speakers of Other Languages	
Authorization Levels: PK-12 (ECE/ELE L, ML/HS)	
Cross-Cultural Language and Development (CLAD) Credential, California	2006
Authorization Levels: K-12	
Level II Professional Clear Education Specialist, California	2004
Endorsement: Mild/Moderate Disabilities	
Authorization Levels: K-12	

Certifications

2019	SMART Institute
	Institute of Education Sciences, U.S. Department of Education
2015	What Works Clearinghouse Reviewer Certification, Group Design (Standards 3.0)
	Institute of Education Sciences, U.S. Department of Education
2014	Cluster-Randomized Controlled Trial Institute
	Institute of Education Sciences
2013	What Works Clearinghouse Reviewer Certification, Group Design (Standards 2.1)
	Institute of Education Sciences, U.S. Department of Education

ACADEMIC APPOINTMENTS

Assistant Professor	Boston University <i>Wheelock College of Education & Human Development</i>	07/2021 – present
Associate Director, Translational Research	BU Wheelock Institute for the Science of Education (WISE)	07/2021 – present
Research Associate Professor	University of Oregon <i>Center on Teaching and Learning</i>	06/2020 – 07/2021
Director of Clinic & Outreach	University of Oregon <i>Center on Teaching and Learning</i>	06/2013 – 07/2021
Research Assistant Professor	University of Oregon <i>Center on Teaching and Learning</i>	06/2013 – 06/2020
Research Associate	University of Oregon <i>Center on Teaching and Learning</i>	12/2011 – 06/2013

SELECTED PUBLIC EDUCATION EXPERIENCE

Substitute School Psychologist Bethel School District, Eugene, OR	2016 – 2017
Educational Specialist, Special Education Algebra Teacher, & Case Manager Berkeley High School, Berkeley, California	2004 – 2006
Resource Specialist, Special Education Math/Science Teacher, & Case Manager Calvin Simmons Middle School, Oakland, California	2002 – 2004

SELECTED AWARDS AND HONORS

University of Oregon, College of Education Supervision Award	2019
Learning Disability Quarterly, Inaugural “Must Read” Article, Volume 36	2014
Institute on the Learning of Fractions Early Scholar Invitee	2013
Claire Wilkins Chamberlin Memorial Research Award	2010
Dynamic Measurement Group Award	2009
Wes Becker Memorial Award	2008
Ford Scholar, Ford Family Foundation	2002

SELECTED EXTERNAL FUNDING (Total > \$47M as PI or Co-PI)

National Comprehensive Center on Improving Literacy for Students with Disabilities (2021-2026). Office of Elementary and Secondary Education & the Office of Special Education and Rehabilitative Services. \$7,500,000. PI: Fien
Role: **Deputy Director**

Collaborative Research: Leveraging Simulations in Preservice Preparation to Improve Mathematics Teaching for Students with Disabilities (2021-2025). National Science Foundation, DRK-12, NSF 20-572, \$3,000,000. PIs: Cohen & Jones
Role: Co-Investigator

Effectiveness Replication of Enhanced Core Reading Instruction (ECRI: 2021-2026). Institute of Education Sciences, Systematic Replication Effectiveness. Subaward from RAND Corporation, \$1,528,677. PI: Wang
Role: Co-Principal Investigator

The Development and Pilot Testing of an Intensive Tier 3 Reading Intervention in the Early Grades (2021-2025). Institute of Education Sciences, Goal 2, \$2,000,000. PI: Nelson
Role: Project Director/Principal Investigator

Reach Every Reader Assessment (2019-2023). Chan Zuckerberg Foundation. Subaward from Florida State University, \$295,740. PI: Nelson
Role: Project Director/Principal Investigator

Training Provider for Multi-Tiered Systems of Support for Reading in the Early Grades (2019-2024). Institute of Education Sciences, National Impact Evaluation (Contract 91990018C0046), Subaward from American Institutes for Research, \$3,275,000. PI: Nelson
Role: Project Director/Principal Investigator of ECRI MTSS-R Study Arm

Center on Improving Literacy Through Supporting Elementary School Leaders (2019-2024). U.S. Department of Education, Office of Special Education and Rehabilitative Services, Office of Special Education Programs. Technical Assistance and Dissemination Program (CFDA 84.326), \$3,750,000. PI: Fien
Role: Co-Principal Investigator

Evaluating a State-Level Initiative to Implement Supplemental Academic and Behavior Interventions in Integrated Multi-Tiered Systems of Support. Institute of Education Sciences, Low-Cost, Short Duration Evaluation of Special Education Interventions (2018-2020), \$250,000. PI: Nelson
Role: Project Director/Principal Investigator

National Comprehensive Center on Improving Literacy for Students with Disabilities (2016-2021). Office of Elementary and Secondary Education & the Office of Special Education and Rehabilitative Services. \$7,448,728. PI: Fien
Role: Co-Principal Investigator/Deputy Director

The NumberShire Integrated Tutor System: Supporting Schools to Scale Up Evidence-Based Education Technology to Improve Math Outcomes for Students with Disabilities (2016-2021). Educational Technology, Media, and Materials for Individuals with Disabilities Program/Stepping-up Technology Implementation, \$2,488,179. PI: Nelson & Shanley
Role: Co-Project Director/Principal Investigator

A Multi-Site Randomized Controlled Trial to Assess the Efficacy of the NumberShire Level 1 Gaming Intervention for Improving Math Outcomes for Students with or At Risk for Math Learning Disabilities (2016-2020). Institute of Education Sciences, Goal 3, \$3,499,992. PI: Fien
Role: Co-Principal Investigator

Precision Mathematics: Using Interactive Gaming Technology to Build Student Proficiency in the Foundational Concepts and Problem-Solving Skills of Measurement and Data Analysis (2015-2019). National Science Foundation, DRK-12, NSF 13-601, \$2,999,702. PI: Doabler
Role: Co-Principal Investigator

Project CIFOR: Exploring Alterable Variables of Tier 1 and Tier 2 Instruction: A Collaboration Across Interdisciplinary Fields of Observational Research (2015-2017). Institute of Education Sciences, NCER, Goal 1 (Effective Teachers and Effective Teaching), \$699,706. PI: Doabler
Role: Co-Principal Investigator

Development of a Second Grade Game-Based Integrated Learning System to Target Whole Numbers and Operations in Base Ten and Operations and Algebraic Thinking (2013-2015): Grade 2 (NSII), Phase II proposal funded by Small Business Innovation Research in Special Education, U.S. Department of Education, Institute of Education Sciences to Thought Cycle, LLC, \$900,000. PI: Gause
Role: Co-Principal Investigator

NumberShire: Development of a game-based integrated learning system on whole number concepts (2012-2016): Kindergarten (NSK) proposal funded by U.S. Department of Education, Institute of Education Sciences, NCSER, Goal 2 (Technology for Special Education) to the University of Oregon, \$1,499,535. PI: Fien
Role: Co-Principal Investigator

Promoting Algebra Readiness (PAR): Development of a 6th grade rational numbers intervention (2012-2015). U.S. Department of Education, Institute of Education Sciences, NCSER, Goal 2 (Mathematics and Science Education), \$1,499,966. PI: Clarke
Role: Co-Principal Investigator

Middle School Intervention Project (MSIP): Evaluation of Systems of Reading and Behavior Intervention (2010-2016). U.S. Department of Education, Institute of Education Sciences, Evaluation of State and Local Programs and Policies, \$7,164,350. PI: Baker
Role: Co-Principal Investigator

SELECTED PUBLICATIONS, PRESENTATIONS, AND PRODUCTS

Selected Refereed Journal Articles

- Suhr, M. P., **Nelson, N. J.**, Markham-Anderson, J., & Kosty, D. (under review). An Examination of Factors Associated with Teachers' Use of Evidence-Based Instructional Practices in Tier 1 Reading Instruction. *Manuscript submitted for publication*.
- Baker, S. K., Kennedy, P. C., Richards, D., **Nelson, N. J.**, Fien, H., & Doabler, C. T. (2023). Measuring Instructional Interactions During Reading Instruction for Students Receiving Intervention in Middle School. <https://doi.org/10.1177/00222194231211948>
- Lesner, T., Clarke, B., Kosty, D., **Nelson, N.**, Ketterlin-Geller, L., & Smolkowski, K. (2023). Exploring the Relationship Between Initial Mathematics Skill and a Sixth-Grade Fractions Intervention. *Learning Disability Quarterly*, 46(4), 317-328. <https://doi.org/10.1177/07319487231168385>
- Clarke, B., **Nelson, N. J.**, Kosty, D. K., Ketterlin-Geller, L. R., Smolkowski, K., ⁺Lesner, T., ⁺Furjanic, D., & Fien, H. (2022). Investigating the promise of a tier two sixth grade fractions intervention. *Learning Disability Quarterly*, 45(4), 252-266.
- Gearin, B., Petscher, Y., Stanley, C., **Nelson, N.**, & Fien, H. (2022). Document analysis of state legislation suggests likely heterogeneous effects on student and school outcomes. *Learning Disability Quarterly*, 45(4), 267-279.
- Doabler, C. T., Clarke, B., Kosty, D., Sutherland, M., Turtura, J. E., Firestone, A. R., Kimmel, G. L., Brott, P., Brafford, T. L., **Nelson Fien, N. J.**, Smolkowski, K., & Jungjohann, K. (2022). Promoting understanding of measurement and statistical investigation among second-grade students with mathematics difficulties. *Journal of Educational Psychology*, 114(3), 560-575.
- Clemens, N. H., Solari, E., Kearns, D. M., Fien, H., **Nelson, N. J.**, Stelega, M., Burns, M., St. Martin, K., Hoeft, F. (2021). They say you can do phonemic awareness instruction "in the dark" but should you? A critical evaluation of the trend toward advanced phonemic awareness training. Pre-print publication available from PsyArXiv.
- Nelson Fien, N. J.** & Fien, H. (2021). Incorporating evidence-based instructional practices in Tier 1 to support at-risk readers. *The Reading League*, 2(2), 13-21.
- Fien, H., **Nelson, N. J.**, Kosty, D., ⁺Pilger, M., Smolkowski, K., Baker, S., & Smith, J. L. (2021). A conceptual replication study of the Enhanced Core Reading Instruction MTSS-Reading Model. *Exceptional Children*, 87(3), 265-288.
- Choo, S., ⁺Park, S., & **Nelson, N. J.** (2021). Evaluating spatial thinking ability using item response theory: Differential item functioning across math learning disabilities and geometry instruction. *Learning Disability Quarterly*. <https://10.1177/0731948720912417>

Gaab, N., Hogan, T., **Nelson, N. J.**, Patton-Terry, N., Pentimonti, J., Petscher, Y., Sayko, S., & Solari, E. J., (2020). Translational science: A roadmap for the science of reading. *Reading Research Quarterly*. <https://doi.org/10.1002/rrq.357>

Selected Podcasts, Technical Reports, Briefs, Websites, and Professional Webinars

Hall, C., Solari, E. J., Vaughn, S., & **Nelson, N. J.** (2023, June). Evidence from 40 Years of Research: Intervention for Students with or at Risk for Dyslexia. Webinar available from the National Center on Improving Literacy: <https://improvingliteracy.org/video/evidence-40-years-research-intervention-students-or-risk-dyslexia>.

Cardenas-Hagan, E., Landi, N., **Nelson, N. J.**, & Hanford, E. (2023, March). The State of the Science of Reading for Supporting Students with Reading Disabilities. Webinar hosted by the National Center on Improving Literacy and presented at the Boston University Wheelock Forum, Boston, MA. Available from the National Center on Improving Literacy: <https://improvingliteracy.org/video/state-science-reading-supporting-students-reading-disabilities>

Nelson, N. J. (2019). Myths and misconceptions about universal screening. Science of Reading: The Podcast. Available from Amplify. Recorded December 12, 2019.

Selected Curriculum and Evaluation Products

Fien, H., Baker, S. K., Smith, J., Dissen, C., **Nelson, N. J.**, Santoro, L., Travers, T., & Kame'enuei, E. J. (2008-present). Enhanced Core Reading Instruction. Available from the Center on Teaching and Learning at the University of Oregon, Eugene, OR.

Nelson, N. J., Shanley, L. S., Fien, H., Doabler, C. T., Clarke, B., Brott, P., McCammon, S., & Reinmuth, G. (2017). NumberShire Integrated Tutor System. Available from the Center on Teaching and Learning at the University of Oregon, Eugene, OR.

Selected Peer-Reviewed National and International Conference Presentations

Suhr, M., **Nelson, N.**, Al Otaiba, S., Stewart, J., & van Dijk, W. (2023). Intensifying Interventions for Students in Tier 3. In Council for Learning Disabilities Conference. Denver, CO.

Nelson, N. J. & Markham-Anderson, J. (2022, November). Translational research: An evidence-based approach applying the science of reading to instruction. Standard presentation delivered at the International Dyslexia Association (IDA) 2022 Annual Reading, Literacy & Learning Conference, San Antonio, TX.

Hinkle, H., Choo, S., Shanley, L., **Nelson, N. J.**, & Fien, H. (2021, April). Improving teacher use of data-based decision-making and differentiated instruction through evidence-based

educational technology. Roundtable session presented at the 2021 Virtual Meeting of the American Educational Research Association.

Gearin, B., **Nelson, N.**, Sayko, S. (2020, November). Dyslexia screening and intervention in multitiered systems of support: Considerations and recommendations. Presentation delivered at the International Dyslexia Association Virtual Conference.

Choo, S., Shanley, L., Hinkle, H. & **Nelson, N.** (2020, October). Data-based decision making in an evidence-based math game intervention. Paper presented at the Virtual International Conference on Learning Disabilities.

SELECTED PROFESSIONAL SERVICE

National Center on Improving Literacy

Instruction and Intervention (P2) Strand Lead	2022 – present
Professional Development and Technical Assistance (P4) Strand Lead	2016 – 2022

Grant Panel Reviews

National Science Foundation, Discovery Research K-12	2018, 2024
Office of Special Education Programs, CFDA 84.325D (Leadership Preparation)	2019

Editorial Review Boards

TEACHING Exceptional Children	2016 – present
Journal of Special Education Technology	2016 – present

Professional Organization Service

Council for Learning Disabilities, Leadership Academy Mentor	2018 – 2021
Council for Learning Disabilities, Conference Committee, Co-Chair	2015 – 2016
Oregon School Psychologists Association, President	2017 – 2018

Other Professional Service & Consultation

NCII Assessing English Learner Advisory Board	2023
COSTI Lead Trainer for CLSD grant program (AIR)	2022 – 2023
DESE Advisory Committee on Literacy Screening	2022
DIBELS 8 th Edition Professional Development Director	2019 – 2021
WWC Study Reviewer, Protocol for <i>RTI in Reading Grades 1-3</i>	2014 – 2015

CURRENT PROFESSIONAL AFFILIATIONS

American Educational Research Association (AERA)
 Division H: Research, Evaluation, & Assessment in Schools
 Council for Exceptional Children (CEC)
 Division of Learning Disabilities (DLD)
 Teacher Education Division (TED)
 Council for Learning Disabilities (CLD)
 National Association of School Psychologists (NASP)
 Society for Research on Educational Effectiveness (SREE)



Lynn Holdheide, M.S.



EXPERTISE

Topic Areas

- Pathways into the profession, teacher/leader preparation, educator effectiveness/talent management, educator shortages, mentoring and induction.
- IDEA, special education, students with disabilities, inclusive services, and high-leverage practices.



EDUCATION

- M.S., Eastern Illinois University, Special Education, 2006
- B.S., Ohio State University, Special Education, 1991



EXPERIENCE

- 15 years of experience providing technical assistance to states, districts, and educator preparation programs, advising national and state policymakers, and writing extensively on educator development



EMPLOYMENT HISTORY

American Institutes for Research
2012–Present
Vanderbilt University
2007–2012
Independent Consultant, Indiana
Department of Education
1999–2007

Present Position

Managing Technical Assistance Consultant, American Institutes for Research (AIR) (2012–Present)

Leads a variety of national, state, and district technical assistance projects that address the needs of states and districts to translate and connect cutting-edge research to real-world, practical experiences that lead to sustainable change for schools, equitable opportunities for students, and positive results for communities. She directs projects and spearheads support to states and districts on the design and implementation of evidence-based strategies to strengthen and diversify the educator workforce and to ensure that students with disabilities receive a high-quality education. Her work has gained national recognition and sought-after expert on educator quality and special education.

Senior Advisor, Collaboration for Effective Educator Development, Accountability, and Reform, AIR (2022–Present)

Advises CEEDAR leadership on technical assistance and teacher and leader preparation reform, including pathways into the profession (Grow your Own, Registered Teacher Apprenticeships) and educator shortages.

Project Director, Connecticut Special Education Department's IEP Quality Training & Special Education Personnel Development Grant, AIR (2020–present)

Leads the development of a range of hybrid, professional learning efforts using asynchronous and synchronous professional learning modules, coaching, and communities of practice. Designs train-the-trainer modules and supports the implementation of statewide professional development for general and special education teachers (2000+ teachers) on high-quality Individualized Education Program development and implementation.

Principal Investigator, Lead IDEA Center (2023–present)

Provides guidance and direction to the Lead IDEA Center - an Office of Special Education funded national technical assistance center. The Center will use a research- and stakeholder-informed process to establish a set of competencies used to guide the preparation and development of school building, early intervention/early childhood and special education administrators.

Director, Center on Great Teachers and Leaders, AIR (2017–2019)

Conceptual leader and management oversight for the Center’s work to support states and districts in their efforts to strengthen the educator workforce. Led efforts to strengthen partnerships with regional centers, states, national associations, and other federally funded TA Centers. Has developed and provided conceptual oversight for over 100+ resources and tools designed to facilitate the decision-making and implementation process for educator evaluation, professional learning, mentoring and induction, teacher leadership, equitable access to effective educators, and social and emotional learning.

Senior Advisor, Center on Great Teachers and Leaders, AIR (2016–2017)

Served as a conceptual thought partner and provided guidance and oversight of technical assistance efforts to improve educator quality. Lead the Center’s evaluation efforts and provided guidance and oversight concerning the continuous improvement of the Center’s technical assistance.

Deputy Director, Center on Great Teachers and Leaders, AIR (2012–2016)

Lead efforts to build regional comprehensive center (RCCs) and state capacity concerning the development, support, identification, and rewarding of effective teachers and leaders. Provided direct technical assistance to strengthen policies and systems that support highly effective teachers and leaders and their capacity to support students with disabilities.

Independent Education Consultant, Indiana Department of Education, Division of Special Education (1999–2007)

Project director for the Indiana Post-School Follow-Up Study – a statewide study that collected and reported data on students after they exited high school. As committee member on the Employability Skills Work Group, worked to develop a statewide system to measure students’ employability skills. As member of the SB 290 Work Group, advised state directors and policymakers regarding secondary transition policy and practices.

Employment History

2016- present	Managing Technical Assistance Consultant
2014–2016	Principal Technical Assistance Consultant, AIR
2012–2014	Senior Technical Assistance Consultant, AIR
2007–2012	Special Education Consultant, Vanderbilt University and National Comprehensive Center for Teacher Quality
2007	Independent Education Consultant, Vanderbilt University
1999–2007	Independent Education Consultant, Indiana Department of Education
1996–1999	Education Consultant, Indiana Department of Education
1994–1996	Transition Specialist, Crossroads Rehabilitation Center
1993–1994	Manager, Residential Management Services
1992–1993	Special Education Teacher, Columbus Ohio
1991–1993	Tutor, Ohio State University Reading Clinic
1988–1991	Teacher, North Broadway Children’s Center, Columbus, Ohio

Professional Affiliations/Roles

- Reviewer, Every Student Succeeds Act (ESSA) State Consolidated Plans (2017)
- Reviewer, Elementary and Secondary Education Act Flexibility Waiver (2012)

Selected Publications

Book chapters

Kimmel, L., Hayes, L., Holdheide, L., Mizrav, E., & Lachlan-Hache, L. (2021). Shifts in Thinking: Understanding and Addressing Educator Shortages in Rural Communities.

Meyers, C., & Darwin, M., *Rural School Turnaround and Reform: It's Hard Work!*
Information Age Publishing, Inc., Charlotte.

Yoder, N., Holdheide, L., & Osher, D. (2018). Educators Matter (pp. 223-234). D. Osher, D. Moroney, & S. Williamson, *Creating Safe, Equitable, Engaging Schools: A Comprehensive, Evidence-based Approach to Supporting Students*, Harvard Education Press: Cambridge.

Vaughn, S., Danielson, L., Edmonds, R.Z., & Holdheide, L. (2017). Deeper learning for students with disabilities (pp 103-122). R. Heller, R.E. Wolfe, & A. Sternberg (Eds), *Rethinking Readiness*, Harvard Education Press: Cambridge.

Journal articles

Holdheide, L., Cirks, T., Chagnon, E., & Osher, D., (in press). *Educator*, Winter 2020-2021. Using and Generating Evidence in Technical Assistance: Our Evolution and Next Steps. *Evaluation and the Health Profession*.

Holdheide, L. & Lachlan-Hache', L. (2019). Learner-Ready to Expert Practitioner: Academy Supports Teachers' Transition While Addressing Equity. *Learning Forward Professional*, 40, (1).

Hayes, L. & Holdheide, L. (2016) Educator Evaluation 3.0: Leveraging Educator Evaluation Systems to Improve Outcomes for Students with Disabilities. *Texas Education Review*. 4, (1), 54-59. Retrieved from: http://txedrev.org/wp-content/uploads/2016/06/6.-Leverag_Educator_Eval_Systems_Improve_Outcomes-Publication-Ready.pdf

Holdheide, L. (2015). Same debate, new opportunity: Designing teacher evaluation systems that promote and support educators in practices that support ALL students' learning. *Journal of Special Education Leadership: Special Issue on Special Education teacher Evaluation in Practice: Voices from the Field*. 28, (2).

Technical reports

Holdheide, L., Kimmel, L., Jirous-Rapp, J., James, W. & King, J. (2023). *Take a Seat at the Table: The Role of Educator Preparation Programs in Registered Teacher Apprenticeship Programs*. American Institutes for Research, Center on Great Teachers and Leaders. Retrieved from: [https://www.air.org/resource/report/take-seat-table-role-educator-preparation-programs-teacher-apprenticeship-programs#:~:text=Educator%20preparation%20programs%20\(EPPs\)%20have,and%20continuous%20improvement%20of%20programs](https://www.air.org/resource/report/take-seat-table-role-educator-preparation-programs-teacher-apprenticeship-programs#:~:text=Educator%20preparation%20programs%20(EPPs)%20have,and%20continuous%20improvement%20of%20programs).

Danks, A., Mizrav, E., Eisner, R., & Holdheide, L. (2023). *Emerging Pathways Into the Teacher Profession: Evaluating and Substantiating Their Effectiveness*. American Institutes for Research, Center on Great Teachers and Leaders and Center for Economic Evaluation. Retrieved from: <https://www.air.org/resource/emerging-pathways-teacher-profession-evaluating-and-substantiating-their-effectiveness>.

Herburger, D., Holdheide, L., & Sacco (2020). *Removing Barriers to Effective Distance*

- Learning by Applying the High-Leverage Practices: Tips and Tools*. University of Florida, CEEDAR Center and National Center for Systemic Improvement. Retrieved from: <https://cedar.education.ufl.edu/wp-content/uploads/2020/10/CEEDAR-Leveraging-508.pdf>
- Hayes, L., Kamman, M., Robinson, S. Hougan, M. & Holdheide, L. (2019). *Roadmap for educator preparation reform. Collaboration for Effective Educator Development Accountability and Reform*. Retrieved from <http://cedar.education.ufl.edu/wp-content/uploads/2019/04/Roadmap-for-educator-preparation-reform.pdf>
- Benedict, A., Holdheide, L., Brownell, M., & Foley, A. (2016). *Learning to Teach: Practice-based Opportunities within Teacher Education*. Washington, DC: Center on Great Teachers and Leaders, CEEDAR Center, and National Governors Association. Retrieved from: <http://www.gtlcenter.org/products-resources/learning-teach-practice-based-preparation-education>
- Benedict, A., Foley, A., Holdheide, L., Brownell, M., & Kamman, M. (2016). *Learning to Teach: A Framework for Crafting High-quality Practice-based Preparation*. Washington, DC: Center on Great Teachers and Leaders and CEEDAR Center. Retrieved from: <http://cedar.education.ufl.edu/wp-content/uploads/2016/06/Learning-to-Teach-Rubric.pdf>
- Bailey, T., Demonte, E., & Holdheide, L. (2016). *State Policy and Practice Portrait: Influencing Educator Preparation: Leveraging the Collaboration for CEEDAR Center to Fulfill the Council for the Accreditation of Educator Preparation (CAEP) Requirements*. University of Florida, CEEDAR Center. Retrieved from: <http://cedar.education.ufl.edu/wp-content/uploads/2016/05/Policy-Portrait-Alignment.pdf>
- Marx, T., Weingarten, Z., & Holdheide, L. (May, 2016). *Aligning Efforts: Reaching Coherence Through Strategic Collaboration*. University of Florida, CEEDAR Center. Retrieved from: <http://cedar.education.ufl.edu/wp-content/uploads/2016/05/Policy-Portrait-Alignment.pdf>
- Demonte, E., Holdheide, L., & Sindelar, P. (October, 2016). *Teacher Shortages: Meeting the Demand Without Sacrificing Quality Preparation and Support*. University of Florida, CEEDAR Center. Retrieved from: <http://cedar.education.ufl.edu/wp-content/uploads/2016/10/Teacher-Shortages-Policy-and-Practice-Portrait.pdf>
- Holdheide, L. & Demonte, E. (March, 2016). *Critical Shortages in Special Education Teachers. Sound Familiar?* American Institutes for Research, Policy Center Blog, Washington, DC. Retrieved from: <http://educationpolicy.air.org/blog/critical-shortages-special-education-teachers-sound-familiar>
- Vaughn, S., Danielson, L., Zumetta, R., & Holdheide, L. (2015). *Deeper learning for students with disabilities*. Boston, MA: Jobs for the Future. Retrieved from: <http://jff.org/publications/deeper-learning-students-disabilities>
- Holdheide, L., & Hayes, L., (2014). *Evaluating specialized instructional support personnel: Supplement to the practical guide to designing comprehensive teacher evaluation systems*. Washington, DC: Center on Great Teachers and Leaders. Retrieved from

- Holdheide, L. (2013). *Inclusive design: Designing educator evaluation systems that support students with disabilities*. Washington, DC: Center on Great Teachers and Leaders. Retrieved from http://www.gtlcenter.org/sites/default/files/GTL_Inclusive_Design.pdf
- Holdheide, L., Browder, D., Warren, S., Buzick, H., & Jones, N. (2012). *Using student growth to evaluate educators of students with disabilities: Issues, challenges, and next steps*. Washington, DC: National Comprehensive Center for Teacher Quality. Retrieved from http://www.isbe.state.il.us/peac/pdf/using_student_growth_summary0112.pdf
- Goe, L., Holdheide, L., & Miller, T. (2011). *A practical guide to designing comprehensive teacher evaluation systems*. Washington, DC: National Comprehensive Center for Teacher Quality. Retrieved from <http://www.lauragoe.com/LauraGoe/practicalGuideEvalSystems.pdf>
- Goe, L., & Holdheide, L. (2011). *Measuring teacher contributions to student learning growth for nontested grades and subjects*. Washington, DC: National Comprehensive Center for Teacher Quality.
- Holdheide, L., Goe, L., Croft, A., & Reschly, D. (2010). *Challenges in evaluating special education teachers and English language learner specialists*. Washington, DC: National Comprehensive Center for Teacher Quality.
- Holdheide, L. R., & Reschly, D. J. (2008). *Teacher preparation to deliver inclusive services to students with disabilities*. Washington, DC: National Comprehensive Center on Teacher Quality.
- Max, J., & Holdheide, L. R. (2008). *Response to technical assistance request: Highly qualified special education teachers under the No Child Left Behind Act*. Chicago, IL: National Comprehensive Center for Teacher Quality.
- Reschly, D. J., Holdheide, L. R., Smartt, S. M., & Oliver, S. M. (2007). *Evaluation of LBS-1 teacher preparation in inclusive practices, reading, and classroom organization-behavior management*. Springfield, IL: Illinois State Board of Education.
- Holdheide, L. R., & Majd, C. (2005). *Review and analysis of post-school follow-up results: Indiana Post-School Follow-Up Study*. Indianapolis, IN: Indiana Department of Education, Division of Special Education.

Selected Professional Presentations

- Holdheide, L., Kamman, M., & McCray (2024). *Teacher registered apprenticeships as one response to educator shortages: Possibilities and Considerations*. American Association of Colleges of Teacher Education Annual Convening.
- Holdheide, L., Knight, R., & Hill, U. (2023). Come here, stay here: The role of the principal in mitigating special education teacher shortages. Council of Administrators of Special Education Conference.

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- Holdheide, L., Vanderplueg, L. & Alavi, K. (2022). *From Information to Implementation: Combatting Shortages of Educators Serving Students With Disabilities*. CEEDAR and the Council for Exceptional Children Webinar Series.
- Colpo, A., Alavi, K., & Holdheide, L. (2022). *An Unprecedented Funding Opportunity: Leveraging ESSER Funding to Stabilize the Special Education Workforce*. Council for Exceptional Children Annual Convention.
- Holdheide, L., Hayes, L., & Saunders, R. (2020). *Supporting Inclusive Principals to Strategically Address Educator Shortages*. Chief Council for State School Officers Webinar Series.
- Herberger, D., Holdheide, L., & Sacco, D. (2020). *Removing Barriers to Effective Distance Learning by Applying the High-Leverage Practices*. CEEDAR Center Webinar, University of Florida.
- Hayes, L., Holdheide, L., & Holsapple, N. 2020. *Special Education Shortages Toolkit*. Council for Exceptional Children Annual Convention. Portland, OR.
- Connally, K., McLesky, J., Holdheide, L., & Purcell (2020). *School and District Improvement Through Inclusive Principal Leadership*. Council for Exceptional Children Annual Convention. Portland, OR.
- Holdheide, L., Brownell, M., Kamman, M., & McCray E. (2019). *High Leverage Practices in Action*. Office of Special Education Programs Leadership Conference. Washington, DC.
- Holdheide, L., Kamman, M., & Wyler, K. (2019). *Mentoring and Induction for Educators/Personnel Supporting Students with Disabilities*. Office of Special Education Programs Leadership Conference. Washington, DC.
- Bauserman, A., Cantley, P., Holdheide, L., & Lupia, J. (November, 2019). *Classroom Management: Behavioral Supports, Motivation, Reflective Teaching*. Webinar No. 4 in the Career Technical Education for Students with Disabilities Webinar Series. Cohosted by Penn State College of Education, Workforce Education and Development, the National Technical Assistance Center on Transition (NTACT), and the Association for Career & Technical Education (ACTE).
- Holdheide, L., & West, J. (November, 2019). *Shortages in Special Education*. Panel at the American Association of Colleges for Teacher Education Networked Improvement Community Meeting, Washington, DC.
- Airhart, K., Brownell, M. & Holdheide (October, 2019). *School and District Improvement Through Inclusive Principal Leadership*. National Association of State Directors of Special Education and Council of Administrators of Special Education 2nd Annual Joint Conference, Louisville, KY.
- Holdheide, L., McCray, E., & Mcklesky, J. (September, 2019). *High-Leverage Practices in Special Education: A Professional Development Guide for School Leaders*. Council for Chief State School Officers Inclusive Leadership Webisode Series. Washington, DC.
- Holdheide, L. (April, 2019). *Preparing Personnel with to Serve Children with Disabilities*. Office of Special Education Programs Virtual Symposium Series. Washington DC.

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- Holdheide, L. & Hayes, L. (February, 2019). *Mitigating Special Education Teacher Shortages: A Multi-Pronged, Strategic Statewide Approach*. American Association of Colleges for Teacher Education, Louisville, KY.
- Brownell, M., Hayes, L., Holdheide, L., Kamman, M., & Sindelar, P. (January, 2019). *Mitigating Special Education Teacher Shortages: A Multi-Pronged, Strategic Statewide Approach*. Council for Exceptional Children, Indianapolis, IN.
- Brownell, M., Holdheide, L., Kamman, M., & Myers, J. (October, 2018). *Mitigating Special Education Teacher Shortages: A Multi-pronged, Strategic, Statewide Approach*. Teacher Education Division National Conference. Las Vegas, NV.
- Holdheide, L. & Brownell, M. (October, 2018). *Mitigating Special Education Teacher Shortages: A Multi-pronged, Strategic, Statewide Approach*. National Association of State Directors of Special Education National Convening, Omaha, NB.
- Artzi, L. & Holdheide, L. (September, 2018). *Engaging Educator Preparation Programs/Institutes of Higher Education as Critical Partners*. National Center for Systemic Improvement Collaborative Meeting. Phoenix, AZ.
- Holdheide, L., Fitzpatrick, R., & Wyler, K. (July, 2018) *Strengthening Capacity and Measuring Capacity Change*. Office of Special Education Project Directors Conference. Washington, DC.
- Holdheide, L. (March, 2018). *Professional Learning in Rural Context*. Presenter for the Rural Collaborative. Austin, Texas.
- Holdheide, L., & Knight, T. (April, 2018). *Professional Development: Ensuring a Quality Program*. Presenter for the United States Department of Education's Insular Area Meeting. Washington, DC.
- Holdheide, L., Brownell, M., & McLesky. (April, 2018). *Improving Your Instruction: High-leverage Practices that Work*. Council for Exceptional Children National Convening. Boston, MA.
- Holdheide, L. (July, 2017). *Targeted Coaching and Feedback: Supporting Teacher Practice in High-Leverage (and Evidence-based) Practices*. Arizona Teacher Effectiveness Summit
- Holdheide, L., (July, 2017). *Targeted Coaching and Feedback: Supporting Teacher Practice in High-Leverage (and Evidence-Based) Practices*. Office of Special Education Programs Leadership Conference, Washington, DC.
- Holdheide, L., & Benedict, A., Foley, A. (April, 2017). *Can We Bridge the Implementation Gap? Educator Preparation in Real World Context*. Council for Exceptional Children National Convening, Boston, MA.
- Lutterloh, C., & Holdheide, L. (October, 2016). *School Leaders: An Essential Factor in Evidence-based Practices Implementation*. Presenter for the National Center for Systemic Improvement Collaborative Meeting. Dallas, Texas.

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- McCray, E., Hayes, L., Holdheide, L., Soodak, L., Wiener, R. (August, 2016). *Aligning State Initiatives: Linking Research, Policy, and Practice with Personnel Preparation*. Office of Special Education Project Director's Conference. Washington, DC.
- Haag, K., Erickson, A., Roborough, J., Collette, J., & Holdheide, L. (August, 2016). *Moving from Initiative Overload to Maximum Impact, Supporting and Advancing a Shared Vision across Improvement Efforts*. Office of Special Education Project Director's Conference. Washington, DC.
- Sindelar, P., Holdheide, L., McLescky, J., Clifford, C. & Clark, T. (June, 2016) *How the CEEDAR Center Partners to Improve Outcomes for all Students*. Panel for the National Association of State Directors of Teacher Education and Certification Annual Conference, Philadelphia, PA.
- Ghandi, A., Holdheide, L., Zumetta, R. (April, 2016) *Understanding and Operationalizing Evidence-based Practices in a Multi-tiered System of Support*. Council for Exceptional Children's Annual Conference, Saint Louis, MO.
- Ghandi, A., Holdheide, L., Zumetta R. (February, 2016). *Understanding and Operationalizing Evidence-base Practices in a Multi-tiered System of Support*. Pacific Coast Research Conference, San Diego, CA.
- Holdheide, L. (2016, January). *Panel: Critical Teacher Shortages*. California's Emerging Teacher Shortage: New Evidence and Policy Responses. Panel for the convening hosted by the Learning Policy Institute and American Institutes for Research.
- Holdheide, L. (2015, October). *Supporting educator practice: Increasing assess to effective teachers*. Keynote for the Great Lakes and Midwest Comprehensive Center Advisory Board Meeting: Teaching Deeply: Defining and Building Educator Competencies for 21st Century Teaching. Chicago, IL.
- Holdheide, L., Poda, J., & Xu, Z. (2014, December). *Why teacher preparation matters*. Presented to the National Conference of State Legislatures, Washington, DC.
- Holdheide, L. (2014, September). *Creating coherence: Common Core, Multi-tiered systems of support, and educator effectiveness*. Presented to the Network of Teacher Preparation Reform, Council for Chief State School Officers, Boston, MA.
- Holdheide, L., & Hayes, L. (2014, September). *Multi-tiered systems of support and educator effectiveness*. Presented to the Teacher Education Division of the Council for Exceptional Children, Indianapolis, IN.
- Holdheide, L., & Hayes, L. (2014, September). *Evaluating specialized instructional support personnel*. Presented to the Teacher Education Division of the Council for Exceptional Children, Indianapolis, IN.
- Holdheide, L., Hayes, L., & Lillestein, J. (2014, July). *Multi-tiered systems of support and educator effectiveness*. Presented to the Office of Special Education Programs Project Directors Conference, Washington, DC.

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- Holdheide, L., & Hayes, L. (2014, July). *Evaluating specialized instructional support personnel*. Presented to the Office of Special Education Programs Project Directors Conference, Washington, DC.
- Holdheide, L., & Cushing, E. (2014, April). *Using teacher evaluation data to inform professional learning*. Strategic data project presented to Harvard University, Boston, MA.
- Holdheide, L., & Cushing, E. (2014, April). *Guidance concerning the design and implementation of teacher and leader evaluation systems*. Presented to the Council for Exceptional Children Annual Conference, San Antonio, TX.
- Holdheide, L. (2014, February). *RTI and teacher effectiveness*. Presented to the Pennsylvania Department of Education 2014 Annual Conference, Harrisburg, PA.
- Holdheide, L., & Brownell, M. (2014, February). *Building evaluation systems that support educators of students with disabilities*. Presented to the Third Annual Council for Special Education Directors Hybrid Conference, Orlando, FL.
- Holdheide, L. (2013, July). *Measuring educator effectiveness: Implications for improving teacher preparation programs*. Presented to the Office of Special Education Programs Project Directors Meeting, Washington, DC.
- Holdheide, L. (2013, July). *Considerations concerning the design and implementation of teacher evaluation models that support the academic and social growth of students with disabilities: What is the impact on teacher preparation?* Presented to the Office of Special Education Programs Project Directors Meeting. Washington, DC.
- Holdheide, L., Lillestein, J., & Kirby-Weaver, A. (2013, June). *Building evaluation systems that support teachers of students with disabilities*. Presented at the U.S. Department of Elementary and Secondary Education Waiver Flexibility Training, Washington, DC.
- Holdheide, L. (2013, June). *Pennsylvania's education effectiveness system and multi-systems of support: What is the connection?* Presented to the Pennsylvania Department of Education 2013 Response to Intervention Implementers Forum, Harrisburg, PA.
- Holdheide, L. (2013, June). *Inclusive design: Building teacher evaluation systems that support all teachers and context*. Presented to the Center for Early Education Learning Outcomes Annual Roundtable, San Francisco, CA.
- Holdheide, L. (2013, April). *Guidance concerning the design and implementation of teacher and leader evaluation systems*. Presented at the Beyond Compliance: Embracing Teacher Appraisal at the Center on Lifelong Learning at Indiana University, Indianapolis, IN.
- Holdheide, L. (2013, April). *Co-teaching: How does it fit in teacher evaluation?* Presented at the Beyond Compliance: Embracing Teacher Appraisal at the Center on Lifelong Learning at Indiana University, Indianapolis, IN.
- Holdheide, L., & Jones, B. (2013, March). *Building evaluation systems that support educators of students with disabilities*. Presented to the State Collaborative on Assessments and Student Services Annual Meeting, Baltimore, MD.

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Holdheide, L., & Yoder, N. (2013, March). *Connecting the dots: College and career readiness, performance and professional learning*. Presented to the Georgia State Department of Education Title IIA Conference, Savannah, GA.

Holdheide, L., & Minnici, A. (2012, November). *Toward the seamless integration of college-and-career-ready standards implementation with teacher evaluation and professional learning*. Presented to the American Federation of Teachers Connecting the Dots Conference, Providence, RI.

Holdheide, L. (2012, October). *Toward the effective teaching of college and career ready standards: Making professional learning systemic*. Presented to the 2012 ESEA Title II, Part A National Meeting, Washington, DC.

Holdheide, L., Buzick, H., & Walburton, S. (2012, July). *State considerations in designing and implementing evaluation systems that include teachers of students with disabilities*. Presented to the Office of Special Education Programs Project Directors Conference, Washington DC.

Holdheide, L. (2012, June). *State considerations in designing and implementing evaluation systems that include teachers of students with disabilities*. Presented to the Council of Chief State School Officers National Assessment Conference, Minneapolis, MN.

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Holdheide, L., Buzick, H., Musgrove, M., Franczkeowski, M., & Satterfield, J. (2012, June). *Challenges and considerations in measuring growth of students with disabilities in performance evaluation*. Webinar for the National Comprehensive Center for Teacher Quality, Washington, DC.

Holdheide, L., & Johnston, M. (2012, April). *Including special educators in evaluation and performance-based compensation*. Presented to the Council for Exceptional Children National Convention, Denver, CO.

ANNE HYSLOP

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PROFESSIONAL EXPERIENCE

ALL4ED (ALLIANCE FOR EXCELLENT EDUCATION)

Director of Policy Development

Assistant Director, Policy Development and Government Relations

Washington, DC

May 2021 – present

July 2018 – April 2021

- Manage and lead organizational research related to states' implementation of the Every Student Succeeds Act (ESSA), assessments, accountability, and college and career pathways to improve postsecondary preparation and success
- Provide technical assistance and guidance to state and national leaders and to All4Ed's civil rights and advocacy partners
- Identify advocacy strategy and opportunities, promote All4Ed priorities with the U.S. Department of Education, Congress, and federal policymakers, and use social media, video, and other communications channels to advance All4Ed's agenda

INDEPENDENT CONSULTANT

Washington, DC

September 2017 – July 2018

- Advised and supported clients in the execution of strategic projects by providing research, policy analysis, project management, communications and advocacy support, and grant writing and other written work
- Clients included Alliance for Excellent Education, Bellwether, Data Quality Campaign, EducationCounsel, Education Reform Now, Johns Hopkins University Institute for Education Policy, and the Louisiana Department of Education

CHIEFS FOR CHANGE

Senior Associate, Policy and Advocacy

Washington, DC

February – August 2017

- Supported network of chief state school officers and district superintendents through peer-to-peer advising, knowledge visits, and communities of practice to support ESSA implementation
- Produced research, policy analyses, and briefs and memos on Chiefs for Change members' K-12 priorities, such as school accountability and improvement, school system governance, school choice, funding equity, and high-quality curriculum
- Executed federal and state advocacy agenda via written work, speaking engagements, strategic partnerships, and coalitions

U.S. DEPARTMENT OF EDUCATION

Senior Policy Advisor, Office of Planning, Evaluation, and Policy Development

Washington, DC

March 2015 – January 2017

- Led intra-agency team to develop, draft, and publish new federal regulations and non-regulatory guidance for accountability and school improvement and for innovative assessment demonstration authority under ESSA
- Developed ESSA policy options and strategy for Title I (standards, assessments, and accountability), briefed Assistant Secretaries, Chief of Staff, and White House on proposals, and supported communications and outreach on related initiatives
- Tracked ESSA legislation and generated technical assistance, on behalf of the Department, for congressional offices
- Supported development of the President's annual budget request for the Title I and State Assessments grant programs

BELLWETHER

Senior Policy Analyst

Washington, DC

August 2014 – March 2015

- Generated analysis and commentary on school accountability, ESEA reauthorization, and personalized learning
- Advised clients, including nonprofit advocacy groups and private foundations, to build client knowledge and leverage policy to meet organizational goals and created project concepts for future business development
- Engaged in field-facing activities (e.g., blogging for *Ahead of the Heard*, *Eduwonk*, *Education Post*, and *Education Next*, media interviews, legislative briefings, work groups, panel appearances) to influence public dialogue on K-12 policy

NEW AMERICA

Policy Analyst, Education Policy Program

Washington, DC

August 2012 – August 2014

- Designed and published policy research and analyses on school accountability and improvement, ESEA waivers, and college and career readiness, including reports, briefs, and data visualization
- Provided expert commentary and analysis for *EdCentral* (New America's blog) and external publications
- Named by Sara Mead, for *Education Week*, as one of "Nine People Who Will Shape Education Policy in the Next 10 Years"
- Managed grant proposals, provided feedback on PreK-12 work to analysts and interns, and led PreK-12 strategic plan

ANNE HYSLOP

• Page 2 •

EDUCATION SECTOR
Policy AnalystWashington, DC
June 2011 – August 2012

- Wrote policy briefs and reports on career- and college-ready standards, school accountability, and longitudinal data systems
- Regularly contributed to the Education Sector blog, *The Quick and the ED*, and provided analysis and commentary on K-12 policy to journalists, policymakers, and advocates
- Managed organizational intern program, including project assignment, mentorship, and programming

VIRGINIA EARLY CHILDHOOD FOUNDATION
State Initiatives CoordinatorRichmond, VA
July 2008 – August 2009

- Managed year one implementation of Virginia's Star Quality Initiative (VSQI, later Virginia Quality), a voluntary quality rating system for early childhood programs, and reviewed local proposals and facilitated communication between 13 community coalitions, 150 providers, and over 100 locally contracted program raters and coaches
- Convened state and local government leaders to align goals, quality standards, professional development, and accountability across public and private early childhood initiatives

OFFICE OF GOVERNOR TIM KAINE
Special Assistant to the Secretary of Education
Governor's FellowRichmond, VA
August 2007 – July 2008
June – August 2007

- Supported design and implementation of VSQI pilot for child care centers, staffed VSQI Advisory Board, and led interagency team to develop quality rubric for home-based child care providers
- Finalized VSQI quality indicators based on best practices from other states, developed ratings methodology, and wrote application and guidance document for VSQI pilot

EDUCATION**MCCOURT SCHOOL OF PUBLIC POLICY, GEORGETOWN UNIVERSITY**
Master of Public PolicyWashington, DC
May 2011

- Concentration in Education, Social, and Family Policy

COLLEGE OF WILLIAM AND MARY
Bachelor of Arts in Government, *summa cum laude*Williamsburg, VA
May 2007**PUBLICATIONS**

- When Equity Is Optional: Does Accountability Drive School Spending? (February 2024)
- College and Career Readiness Close Up (All4Ed, October 2023)
- Understanding and Improving Title I of ESEA (All4Ed, January 2023)
- Preparing Students for Careers (All4Ed, March 2021)
- Ready for What? How Graduation Pathways Do—and Do Not—Signal Readiness for College and Careers (All4Ed, February 2021)
- When Equity Is Optional (All4Ed, December 2020)
- Do School Ratings and Accountability Systems Send Consistent Signals about Student Performance? (All4Ed, January 2020)
- Screened Out? States May Underidentify Schools with Low-Performing Subgroups (All4Ed, March 2019)
- Building a Fast Track to College (All4Ed and Education Reform Now, February 2019)
- Too Many States Minimize Student Subgroup Performance in ESSA Accountability Systems (All4Ed, December 2018)
- Hiding in Plain Sight: Leveraging Curriculum to Improve Student Learning (Chiefs for Change, August 2017)
- A Path to the Future: Creating Accountability for Personalized Learning (Bellwether, May 2015)
- The Case Against High School Exit Exams (New America, July 2014)
- It's All Relative: How NCLB Waivers Did—and Did Not—Transform School Accountability (New America, December 2013)
- Getting to 2014 (and Beyond): The Choices and Challenges Ahead (Education Sector, June 2012)
- Ready by Design: A College- and Career-Ready Agenda for California (Education Sector, June 2012)
- Data That Matters: Giving High Schools Useful Feedback on Grads' Outcomes (Education Sector, November 2011)
- The Effect of Standards-Based Accountability on Postsecondary Student Achievement — New Evidence from the ELS:2002 (Master's Thesis—Georgetown University, May 2011) Award # S283B240076

Organization:

Education Northwest
1417 NW Everett Street, Suite 310
Portland, OR 97204

Date: December 21, 2023

Agreement No: 2023-123

Filing Reference: This replaces previous
Agreement No. 2022-124

Dated: 10/18/2022

The approved indirect cost rates herein are for use on grants, contracts, and other agreements with the Federal Government. The rates are subject to the conditions included in Section II of this Agreement and regulations issued by the Office of Management and Budget (OMB) Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards under 2 CFR 200.

Section I - Rates and Bases

<u>Type</u>	<u>From</u>	<u>To</u>	<u>Rate</u>	<u>Base</u>	<u>Applicable To</u>
Final	1/1/2022	12/31/2022	39.8%	MTDC	Unrestricted
Final	1/1/2022	12/31/2022	31.5%	MTDC	Restricted
Provisional	1/1/2023	12/31/2023	33.0%	MTDC	Unrestricted
Provisional	1/1/2023	12/31/2023	24.0%	MTDC	Restricted
Provisional	1/1/2024	12/31/2024	33.0%	MTDC	Unrestricted
Provisional	1/1/2024	12/31/2024	24.0%	MTDC	Restricted

Distribution Base:

MTDC Modified Total Direct Costs – Total direct costs excluding equipment, capital expenditures, participant support costs, pass-through funds, and the portion of each subaward (subcontract or subgrant), above \$25,000 (each award; each year).

Applicable To:

Unrestricted Unrestricted rates apply to programs that do not require a restricted rate per 34 CFR 75.563 and 34 CFR 76.563.

Restricted Restricted rates apply to programs that require a restricted rate per 34 CFR 75.563 and 34 CFR 76.563.

Treatment of Fringe Benefits:

Fringe benefits applicable to salaries and wages are treated appropriately as direct or indirect costs. Vacation, holiday, sick leave and other paid absences are included in salaries claimed on awards. Separate claims for paid absences are not made.

Capitalization Policy: Items of equipment are capitalized and depreciated if the initial acquisition cost is equal to or greater than \$1,000.

Section II – Particulars

Limitations: Application of the rates contained in this Agreement is subject to all statutory or administrative limitations on the use of funds, and payments of costs hereunder are subject to the availability of appropriations applicable to a given grant or contract. Acceptance of the rates agreed to herein is predicated on the following conditions: (A) that no costs other than those incurred by the Organization were included in the indirect cost pools as finally accepted, and that such costs are legal obligations of the Organization and allowable under the governing cost principles; (B) the same costs that have been treated as indirect costs are not claimed as direct costs; (C) that similar types of information which are provided by the Organization, and which were used as a basis for acceptance of rates agreed to herein, are not subsequently found to be materially incomplete or inaccurate; and (D) that similar types of costs have been accorded consistent accounting treatment.

Accounting Changes: The rates contained in this agreement are based on the organizational structure and the accounting systems in effect at the time the proposal was submitted. Changes in organizational structure or changes in the method of accounting for costs which affect the amount of reimbursement resulting from use of the rates in this agreement, require the prior approval of the responsible negotiation agency. Failure to obtain such approval may result in subsequent audit disallowance.

Provisional/Final/Predetermined Rates: A proposal to establish a final rate must be submitted. The awarding office should be notified if the final rate is different from the provisional rate so that appropriate adjustments to billings and charges may be made. Predetermined rates are not subject to adjustment.

Fixed Rate: The negotiated fixed rate is based on an estimate of the costs that will be incurred during the period to which the rate applies. When the actual costs for such period have been determined, an adjustment will be made to a subsequent rate calculation to compensate for the difference between the costs used to establish the fixed rate and the actual costs.

Notification to Other Federal Agencies: Copies of this document may be provided to other Federal agencies as a means of notifying them of the agreement contained herein.

Audit: All costs (direct and indirect, federal and non-federal) are subject to audit. Adjustments to amounts resulting from audit of the cost allocation plan or indirect cost rate proposal upon which the negotiation of this agreement was based may be compensated for in a subsequent negotiation.

Reimbursement Ceilings/Limitations on Rates: Awards that include ceiling provisions and statutory/regulatory requirements on indirect cost rates or reimbursement amounts are subject to the stipulations in the grant or contract agreements. If a ceiling is higher than the negotiated rate in Section I of this agreement, the negotiated rate will be used to determine the maximum allowable indirect cost.

Section III - Special Remarks

Alternative Reimbursement Methods: If any federal programs are reimbursing indirect costs by a methodology other than the approved rates in this agreement, such costs should be credited to the programs and the approved rates should be used to identify the maximum amount of indirect costs allocable.

Submission of Proposals: New indirect cost proposals are necessary to obtain approved indirect cost rates for future fiscal years. **The next indirect cost rate proposal is due six months prior to expiration dates of the rates in this agreement.**

Section IV – Approvals

For the Organization:

Education Northwest
1417 NW Everett Street, Suite 310
Portland, OR 97204

For the Federal Government:

U.S. Department of Education
OFO / OAGRM / ICD
400 Maryland Avenue, SW
Washington, DC 20202-4500


Sig _____

Stuart Ferguson

Name

Chief Financial Officer

Title

December 21, 2023

Date

Andre Hylton

Name

Director, Indirect Cost Division

Title

December 21, 2023

Date

Negotiator: Kayon Graham
Telephone Number: (202) 453-7902

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Adams, B. (2022, February 24). *Teacher retention & recruitment convening: Implementation of TRR action plan* [Presentation]. Teacher Retention & Recruitment Convening, Anchorage, AK, United States.

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[college-going-rates-have-fallen-risking-equity-the-state-economy.html&subscribed=apple%7C001690.6c54f8999934460d99403253ebc2ecda.20](https://www.oregonlive.com/education/2024/06/oregons-college-going-rates-have-fallen-risking-equity-the-state-economy.html&subscribed=apple%7C001690.6c54f8999934460d99403253ebc2ecda.2052)

[52](https://www.oregonlive.com/education/2024/06/oregons-college-going-rates-have-fallen-risking-equity-the-state-economy.html&subscribed=apple%7C001690.6c54f8999934460d99403253ebc2ecda.2052)

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PROPRIETARY BUSINESS INFORMATION

Education Northwest requests confidentiality and wishes to designate the following pages of our project narrative as confidential business information consistent with Executive Order 12600.

Pages 5-14

Pages 23-63

ATTACHMENT

Letters of Support

IDAHO STATE DEPARTMENT OF EDUCATION

MONTANA OFFICE OF PUBLIC INSTRUCTION

CHILD TRENDS

FHI 360

CONCORD EVALUATION GROUP

COALITION OF OREGON SCHOOL ADMINISTRATORS

ROOTS OF INCLUSION

WASHINGTON ASSOCIATION OF SCHOOL ADMINISTRATORS

WASHINGTON EDUCATION ASSOCIATION



April 24, 2024

Jessica Johnson
Education Northwest
1417 NW Everett St, Suite 310
Portland, OR 97209

Dear Ms. Johnson—

On behalf of the Idaho State Department of Education, I am pleased to pledge our commitment to supporting the objectives outlined in our Comprehensive Center work plan and welcome the opportunity to work with Education Northwest as the Region 11 Comprehensive Center. We are confident in Education Northwest's ability to provide high-quality services, and we appreciate their ongoing partnership in meeting the educational needs of Idaho students.

Throughout our partnership, Education Northwest has demonstrated an understanding of Idaho's unique educational landscape, fostering relationships with the department, the State Board of Education, and our K-12 stakeholder groups. We are excited about the prospect of continued collaboration and building on the foundation of work that already exists.

In response to the new regions, priorities, and criteria for regional comprehensive centers, key members of our office have engaged in consultations with your organization. Together, we have proposed projects that align with Idaho's educational priorities. Specifically, our focus will center on enhancing educator preparation, building our organizational capacity to continue implementing professional learning communities across the state, and working on efforts around measuring student achievement outcomes.

Sincerely,



Greg Wilson
Chief of Staff, Idaho State Department of Education



Jessica Johnson
Education Northwest
1417 NW Everett St, Suite 310
Portland, OR 97209

May 24, 2024

Dear Ms. Johnson,

I am pleased to extend the endorsement of the Montana Office of Public Instruction (OPI) for Education Northwest's proposal to serve as the Regional Comprehensive Center encompassing Montana (Region 11). Education Northwest has a profound understanding of Montana's educational landscape, having cultivated significant relationships across the state. We eagerly welcome the opportunity for continued collaboration and service. The Education Northwest team has consistently showcased their extensive expertise and dedication to assisting our staff in enhancing their capacity to develop and implement state-level initiatives, as well as supporting district and school-level efforts aimed at improving educational outcomes for all students.

In our ongoing collaboration with the Region 17 Comprehensive Center, Education Northwest staff have provided invaluable support for various initiatives including our teacher residency program, the implementation of our new statewide assessment, and improvement planning for Comprehensive Support and Improvement schools. Additionally, they have supported planning for our Math Innovation Zone schools and state standards revision. We wish to continue these initiatives in partnership with Education Northwest through the Comprehensive Center to ensure maximum impact on student outcomes.

The Education Northwest staff dedicated to our state possess the professional acumen necessary to deliver high-quality comprehensive services. We are grateful for their past collaborations with us in serving Montana students and eagerly anticipate the continuation of this partnership.

Sincerely,



Elsie Arntzen
State Superintendent

May 31, 2024

Jessica Johnson
Chief Executive Officer
Education Northwest
1417 NW Everett St, Suite 310
Portland, OR 97209

**RE: ALN 84.283B – OESE Comprehensive Centers Program Region 11 (Northwest):
Alaska, Oregon, Washington, Idaho, Montana**

Dear Ms. Johnson,

This letter serves to establish Child Trends’ commitment to collaborate with Education Northwest on the U.S. Department of Education Comprehensive Center Program Region 11 (Northwest).

Child Trends is a national leader in collaborating with systems that support children, youth, and families. Our multidisciplinary collaborative teams have consistently delivered high-quality research and technical assistance (TA) services to various state education agencies (SEAs), local education agencies (LEAs), and school communities, including conducting an in-depth needs assessment with students, educators, and state administrators across 27 states and territories, including Alaska, Oregon, Washington, Idaho, and Montana, to understand their priorities and needs around healthy schools. Using adult learning, improvement science, and implementation science principles, we tailor our services to be responsive to the needs of our partners and support transformative change.

Through our education research and TA services, we support SEAs, LEAs, and school communities in designing, implementing, monitoring, and evaluating policies, programs, and practices. A notable example of our effective partnerships is our role as a core partner on ED’s National Center for Safe Supportive Learning Environments (NCSSLE), delivering federal TA services to enhance school climates. Child Trends has served as a partner on additional ED TA centers, including the Title-IV Technical Assistance Center (T4TAC) and co-leads the National Evaluation and Technical Assistance Center for the Education of Children and Youth Who Are Neglected, Delinquent, or At Risk (NDTAC).

Additionally, our work centers and amplifies the voices of directly impacted communities, including students, families, and educators—especially those who identify as Black, Indigenous, and other people of color; living in poverty; lesbian, gay, bisexual, trans, and queer/questioning (LGBTQ+); people with disabilities; and multilingual learners.

Should Education Northwest succeed with this bid, we are fully committed to working with the Education Northwest team. We will provide expertise in supporting SEAs and LEAs in designing and scaling up evidence-based practices that improve educator diversity, recruitment, and retention in early childhood, primary, and secondary education. Additionally, Child Trends’ will provide expertise in providing training and technical assistance to increase the

capacity of SEAs to support their LEAs in advancing the emotional well-being and engagement of students and staff.

Lastly, we will provide expertise in supporting efforts to improve schools and their climate and safety. Specifically, our work on school climate and safety focuses on the development, implementation, and evaluation of policies, programs, and practices that contribute to inclusive and positive learning environments that bolster all students' physical and social well-being. We ground our school climate and safety work within the Centers for Disease Control and Prevention's Whole School, Whole Community, Whole Child (WSCC) framework, which highlights the interconnected nature of various elements of school health.

We appreciate the opportunity to participate in the proposed comprehensive center.



Natalia Pane
President



359 Blackwell Street
Suite 200
Durham, NC 27701
fhi360.org

May 31, 2024

Jessica Johnson
Chief Executive Officer
Education Northwest
1417 NW Everett St, Suite 310
Portland, OR 97209

**RE: ALN 84.283B – OESE Comprehensive Centers Program Region 11 (Northwest):
Alaska, Oregon, Washington, Idaho, Montana**

Dear Ms. Johnson,

This letter serves to establish FHI 360's commitment to collaborate with Education Northwest on the U.S. Department of Education Comprehensive Center Program Region 11 (Northwest).

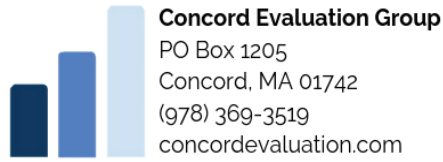
FHI 360 staff and experts can support Education Northwest in the following ways:

- **Develop and implement a comprehensive communication and dissemination plan** – Our team combines the sophistication of a communications firm with the in-depth knowledge of education researchers and practitioners.
- **Contribute to capacity-building services** – We have ready-to-use resources to help build capacity, and our staff can serve as state liaisons and capacity experts, connect with stakeholders, and conduct needs assessments.
- **Support a high-quality personnel management system to obtain and retain technical and content experts** – Our systems and processes connect our bench of experts, coaches, and consultants to the right activities.
- **Promote interest in CTE and STEAM workforce development** – We can build capacity to reduce barriers to participation.
- **Strengthen teachers' abilities to integrate SEL strategies** – Our approaches, programs, and resources help support mental and emotional health.
- **Create professional development programs for educators focusing on career and college readiness** – We can help systems support specific student populations.

Should Education Northwest succeed with this bid, we are fully committed to working with the Education Northwest team. We see our role in supporting this work by leading the communications and engagement role for the project.

We appreciate the opportunity to participate in the proposed comprehensive center.


Bradi Newsome
Acting VP Business Development and Partnerships



June 4, 2024

Jessica Johnson
Chief Executive Officer
Education Northwest
1417 NW Everett St, Suite 310
Portland, OR 97209

**RE: ALN 84.283B – OESE Comprehensive Centers Program Region 11 (Northwest):
Alaska, Oregon, Washington, Idaho, Montana**

Dear Ms. Johnson,

This letter serves to establish Concord Evaluation Group's commitment to collaborate with Education Northwest on the U.S. Department of Education Comprehensive Center Program Region 11 (Northwest).

Concord Evaluation Group has significant experience (over 34 years) providing evaluation services to regional Comprehensive Centers (Region 17) as well as to regional education laboratories (RELNW), states, schools, and educational organizations. Our approach to evaluation is always collaborative and culturally responsive, with the dual goals of contributing to continuous improvement and measuring progress toward outcomes.

Should Education Northwest succeed with this bid, we are fully committed to working with the Education Northwest team. We see our role in supporting this work by providing independent and objective summative evaluation services, including evaluation design; instrument development; data collection via surveys, interviews, site visits, and archives; data analysis; and report writing.

We appreciate the opportunity to participate in the proposed comprehensive center.

Sincerely,



Christine Andrews, Ph.D.
President



**COALITION OF
OREGON SCHOOL
ADMINISTRATORS**

Coalition of Oregon School Administrators
[REDACTED]

Date: June 18, 2024
To: Jessica Johnson, Chief Executive Officer, Education Northwest
From: Krista Parent, Executive Director, Coalition of Oregon School Administrators
Subject: Region 11 Comprehensive Center - Letter of Support

Dear Jessica,

On behalf of the Coalition of Oregon School Administrators (COSA), we are excited to support future engagement with Education Northwest (EDNW), specifically in regards to the organization's proposal to the U.S. Department of Education's (ED) Notice Inviting Applications for the Region 11 Comprehensive Center Contract under the Office of Elementary and Secondary Education's Comprehensive Centers Program.

COSA is a statewide membership association with over 2,900 members across Oregon. Our members are building leaders, central office administrators, and superintendents. Our mission is to develop and support educational leaders to ensure student success. In living our mission, we support our members through a variety of services and supports:

- Professional Learning;
- Leadership and Licensure; and
- Policy and Advocacy

We are a "go to" resource for administrators and are prepared to collaborate with EDNW on technical assistance and supports for district and school administrators, which would help maximize the impact of grant funding on educator capacity and student success.

Please feel free to reach out to me with any questions.

Sincerely,

Dr. Krista Parent
Executive Director, Coalition of Oregon School Administrators

Roots of Inclusion

www.RootsofInclusion.org



Jessica Johnson, Chief Executive Officer
Education Northwest
1417 NE Everett St.
Portland, OR 97209

RE: Region 11 Comprehensive Center

Dear Ms. Johnson,

On behalf of Roots of Inclusion, I am pleased to support future engagement with Education Northwest (EDNW) with regard to its proposal in response to the U.S. Department of Education's (ED) Notice Inviting Applications for the Region 11 Comprehensive Center Contract under the Office of Elementary and Secondary Education's Comprehensive Centers Program.

Our organization is deeply committed to promoting change in our education system to ensure every young person reaches their full human potential. We work in partnership with students, families, organizations, agencies, and communities to better understand and improve the systems and structures that perpetuate inequities and exclusion. Our work leverages adaptive community leadership strategies and targets education system issues including Family and Community Engagement, Improving Inclusive Practices, Social Emotional Learning, Eliminating the use of isolation, Diversifying the Educator Workforce, and Advancing Inclusive Principal Leadership.

We are enthusiastic about the opportunity to collaborate with EDNW on technical assistance activities that engage recipients, offer critical supports, and maximize the impact of grant funding and other engagement opportunities.

Sincerely,

Sarah L Butcher
Director, Roots of Inclusion



June 20, 2024

Jessica Johnson
Chief Executive Officer
Education Northwest
1417 NW Everett Street, Suite 300
Portland, OR 97209

RE: Region 11 Comprehensive Center

On behalf of WASA I am pleased to offer support to Education Northwest (EDNW) with regard to its proposal in response to the U.S. Department of Education's (ED) Notice Inviting Applications for the Region 11 Comprehensive Center Contract under the Office of Elementary and Secondary Education's Comprehensive Centers Program.

WASA is the organization for professional administrators in the State of Washington. With over 1300 members, our organization represents important stakeholder voices for the proposed projects, particularly the development of the learning standards rollout.

We recognize the strong work EDNW provides in our state and are enthusiastic about the potential opportunity to offer support and potential collaboration with EDNW on need sensing and dissemination activities that engage recipients, offer critical supports, and maximize the impact of grant funding and other engagement opportunities.

Sincerely,



G. Joel Aune
WASA Executive Director



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Federal Way, WA 98003
mailing address: P.O. Box 9100
Federal Way, WA 98063-9100
telephone: 253-941-6700
toll free: 800-622-3393
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Larry Delaney, President
Janie White, Vice President
Aimee Iverson, Executive Director

Jessica Johnson
Chief Executive Officer
Education Northwest
1417 NW Everett Street, Suite 300
Portland, OR 97209

RE: Region 11 Comprehensive Center

On behalf of the Washington Education Association (WEA), an affiliate of the National Education Association (NEA) I am pleased to support future engagement with Education Northwest (EDNW) with regard to its proposal in response to the U.S. Department of Education's (ED) Notice Inviting Applications for the Region 11 Comprehensive Center Contract under the Office of Elementary and Secondary Education's Comprehensive Centers Program.

WEA represents over 90,000 educators in Washington state. Recently, WEA has become a state-approved educator preparation program with a new teacher residency program. With a second cohort of residents engaged, WEA is now in the process of becoming a registered apprenticeship program. WEA has a core commitment to race, social and economic justice, and influencing the future of educators preparation is an important way to achieve it. WEA has a long-standing relationship with EdNW and are confident in areas of further, future partnership.

We are enthusiastic about the opportunity to collaborate with EDNW on technical assistance activities that engage recipients, offer critical supports, and maximize the impact of grant funding and other engagement opportunities.

Sincerely,

[Redacted Signature]

James L. Meadows, Ph.D.
Dean, Educator Career Pathways

Budget Narrative File(s)

* **Mandatory Budget Narrative Filename:** 1236-EDNW_R11CC_Budget Justification Narrative.pdf

Add Mandatory Budget Narrative

Delete Mandatory Budget Narrative

View Mandatory Budget Narrative

To add more Budget Narrative attachments, please use the attachment buttons below.

Add Optional Budget Narrative

Delete Optional Budget Narrative

View Optional Budget Narrative

BUDGET JUSTIFICATION**Total Costs Summary**

Category	Year 1	Year 2	Year 3	Year 4	Year 5
Personnel	\$653,263	\$661,863	\$666,972	\$671,814	\$676,780
Fringe Benefits	\$218,843	\$221,724	\$223,435	\$225,057	\$226,721
Travel	\$54,458	\$54,458	\$54,458	\$54,458	\$54,458
Equipment	\$0	\$0	\$0	\$0	\$0
Supplies	\$500	\$500	\$500	\$500	\$500
Contractual	\$1,092,654	\$1,092,654	\$1,092,654	\$1,092,654	\$1,092,654
Construction	\$0	\$0	\$0	\$0	\$0
Other	\$279,268	\$267,787	\$260,967	\$254,503	\$247,873
Total Direct Costs	\$2,298,986	\$2,298,986	\$2,298,985	\$2,298,985	\$2,298,986
Indirect Costs	\$758,665	\$758,665	\$758,665	\$758,665	\$758,665
Training Stipends	\$0	\$0	\$0	\$0	\$0
Total Costs	\$3,057,651	\$3,057,651	\$3,057,651	\$3,057,651	\$3,057,651

EXPLANATION OF COST CATEGORIES

The information contained herein is based on the budget categories defined below. It is Education Northwest's customary practice to estimate all types of proposed contracting vehicles using our standard cost and pricing model.

PERSONNEL HOURS

The calculation of full-time equivalents (FTE) is based on actual working days in the contractual period. There are typically 260 weekdays in each year. One FTE equals 260 working days per year, or 2,080 hours for exempt professional staff (8 hours per day). These total annual hours are then adjusted for average paid time off (PTO), such as holidays, vacation, and personal time off resulting in 1,760 productive hours.

These total productive hours are used to calculate the annual FTE requirements of this proposal. For example, if a task lead is required to be .5 FTE, then the total number of hours proposed are 880 (1,760 hours x .5 FTE).

The level of effort provided in this offeror's proposal reflects the performance work scope with highly qualified staff employed to efficiently carry out the work within the budget we propose.

PERSONNEL COSTS

Personnel costs are derived by multiplying direct labor hours by effective rates to arrive at the base hourly rates used in this proposal. Effective rates are calculated by dividing an employee's base annual salary by the total annual productive hours. For example, an employee making \$85,000 per year has a base effective hourly rate of \$48.30: $\$85,000 / 1,760 = \48.30 per hour budgeted

This proposal contains an average annual increase of 3%, which is established based on policy set annually by the Board of Directors and the organization's collective bargaining agreement. Indirect costs and fees are applied to this direct cost category.

OTHER PERSONNEL

Seven (7) staff members at Education Northwest will serve on the project team to provide professional, communications, logistical, financial, and administrative support.

FRINGE BENEFITS

Fringe benefits consist of the employer's share of costs for employee health, life, and unemployment insurances, retirement plans, Worker's Compensation, payroll taxes, and other benefit costs each employee receives.

Fringe benefits are budgeted by calculating a rate and applying to the direct labor costs category. The rate is calculated by dividing the total pool costs by the total direct labor costs. Indirect costs and fees are applied to this direct cost category. The Fringe Benefit rate is 33.5%.

TRAVEL

The amount proposed includes Education Northwest and its subcontractors' base travel costs. Travel proposed includes subsistence and transportation costs.

Subsistence costs include per diem for lodging and meals and incidental expenses (M&IE). Per diem costs are based on amounts set by the General Services Administration (GSA) per diem schedule. Education Northwest updates its per diem tables annually in its travel and expense software.

Transportation consists of costs for commercial airline carriers and other transportation, including auto rental, taxi fares, parking, and mileage at the current IRS rate per mile. Airfare is budgeted using economy class rates.

SUPPLIES

This category includes items required to perform the activities in the scope of work, such as educational materials, books, periodicals, subscriptions, and supplies needed for the scope of work, such as events and webinars. An estimate based on experience has been budgeted. Actual costs are charged.

CONTRACTUAL

Education Northwest has developed and maintains a set of procedures associated with purchasing and procurement standards following the requirements and guidance from the Code of Federal Regulations (2 CFR 200 Subpart D). The procedures outline actions and guidelines to follow when purchasing all organization-wide items to ensure a standard is met.

Contracted organizations support substantive and unique segments of the work scope. We have built an impressive team of collaborators to help us address regional challenges, resulting in a team with complementary, specialized expertise. We identified contractors and consultants based on their particular expertise, who provide unique knowledge and skills necessary to carry out the service plans successfully.

Costs consist of payment for professional services with skill set not covered by an Education Northwest employee. Such agreements include time, travel costs, and any other material costs required to complete the scope of work.

Concord Evaluation Group

Concord Evaluation Group (CEG) will serve as the external evaluator focused on continuous improvement and summative evaluation. Dr. Christine Andrews founded CEG in 2008. Dr. Andrews has been conducting evaluation research since 199. Since founding CEG, Dr. Andrews has directed evaluation studies for several projects in both formal and informal educational settings focused on learners as well as educators. Her

methodological areas of expertise include program evaluation, qualitative and quantitative research methods, statistics, and human factors research. As the principal research scientist at CEG, Dr. Andrews is responsible for supervising all other research staff and consultants; managing budgets and timelines; conceptualizing research studies; developing study instruments, including web- and paper-based surveys, observational data collection tools, and other measures and instruments; data collection; performing descriptive, qualitative analyses as well as inferential, statistical analyses of quantitative data; report writing; and presenting research findings at client meetings, professional conferences, and in peer-reviewed journals. Dr. Andrews has been working with Education Northwest since 2012 as part of the Regional Educational Laboratory Northwest and currently with the Region 17 Comprehensive Center.

Child Trends

Child Trends brings needs sensing, research, and capacity-building expertise in many key content areas of the work including educator workforce development, early learning, and supporting populations with specific learning needs. For example, Child Trends brings an important and unique expertise to the R11CC with their specialized experience working with neglected or delinquent children and youth through their role on The National Technical Assistance Center for the Education of Neglected or Delinquent Child and Youth. Founded in 1979, Child Trends is the nation's leading research organization with the sole mission to improve the lives of children and youth, particularly those from communities of color and those living in poverty. They work to ensure that all children thrive by conducting nonpartisan research and partnering with practitioners and policymakers to apply that knowledge. They believe that programs and policies that serve children are most effective when they are grounded in deep knowledge of child and youth

development and informed by data and evidence. Founded in 1979, Child Trends is the nation's leading research organization with the sole mission to improve the lives of children and youth, particularly those from communities of color and those living in poverty. They work to ensure that all children thrive by conducting nonpartisan research and partnering with practitioners and policymakers to apply that knowledge. They believe that programs and policies that serve children are most effective when they are grounded in deep knowledge of child and youth development and informed by data and evidence.

FHI360

FHI360 will provide top-tier expertise and innovation in stakeholder engagement, communication, and coordinated dissemination and outreach for the R11CC to address the full range of its stakeholder engagement, needs sensing, and communications needs. They bring national and regional experience and expertise directly relevant to the work of the comprehensive centers (CCs). As a national organization providing services to and supported by federal agencies, we have led many large-scale projects with multiple partners to deliver capacity-building services and tools. We have worked in every state, with more than 400 LEAs, nearly 100 tribal communities, and with more than 60 institutions of higher education.

Subject Matter Experts

We have assembled a cohort of on-call individual experts, external to the formal R11CC partnership, who have deep subject matter knowledge related to Region 11 focus areas and extensive experience providing technical assistance at various education system levels. We identified this external cohort based on their location in the region, existing relationships and work with clients, and experience and expertise in Region 11 priority areas. One specific SME, Dr. Barbara Adams, has committed to being an exclusive SME

for EDNW's Region 11 proposal and will be the lead on the AK Educator Shortages project immediately upon award.

Advisory Board

We will establish an advisory board to support and guide the priorities and services of projects across the region. The board will consist of not more than 15 members and will include chief State school officers and other SEA leaders from each state within the region, TEAs, LEAs, educators, students, parents representing both urban and rural areas, representatives of business, and others with expertise using the results of research and evaluations. Each member will receive a stipend of \$1,000 per year for their time.

OTHER SERVICES

Postage and Shipping

This category is budgeted based on the shipping needs of the scope of work, such as preparation for hosting events. A modest estimate based on experience has been budgeted. Actual costs are charged.

Copying

This category contains the duplication needs required by the scope of work activities, such as event preparation and hosting. A modest estimate based on experience has been budgeted. Actual costs are charged.

Occupancy

Education Northwest directly allocates the costs of rent, facilities maintenance and services, information technology equipment, software, services, and telecommunications, as well as other miscellaneous overhead costs. These costs are considered directly associated with the scope of work for this project and are pooled, calculated, and applied as a factor of total

organizational direct labor hours. Education Northwest strives to maintain a consistent occupancy rate. The current rate is \$3.00 per direct labor hour budgeted.

Other services may also include fees paid for conference registrations and other expenses, such as meeting space rental, audio-visual equipment, and related costs associated with conferences hosted by Education Northwest.

Indirect Costs

Education Northwest negotiates annually a fixed indirect cost rate with the U.S. Department of Education's Indirect Cost Group to apply its indirect costs. Our negotiator at the department is Andre Hylton, andre.hylton@ed.gov or 202-245-7568.

The indirect rate is a calculation derived from a pool of costs including accounting, contracts, human resources, executive management, and corporate communication tasks and applied using the modified total direct cost (MTDC) base method. MTDC base is the total of all direct labor costs, applicable fringe benefits, travel, direct occupancy costs, postage and shipping, duplication, materials and supplies, consultants, other services, and subawards up to the first \$25,000 of each subaward as defined in 2 CFR 200. This offeror is using Education Northwest's provisional 2024 indirect cost unrestricted rate of 33% for this proposal. See Appendix II.C.

COST ACCOUNTING, ESTIMATING, AND PURCHASING SYSTEMS

Education Northwest is well equipped to properly allocate costs in accordance with federal guidelines. The organization annually enters into more than 120 contracts, grants, or cooperative agreements with a variety of funding agencies. We administer various contracting vehicles to carry out the work, including cost reimbursement, fixed price, and time and materials.

As a result, our cost accounting system (Deltek Costpoint) is designed to properly charge and allocate costs to the appropriate contracts and grants.

Deltek's Costpoint is an industry-proven and trusted project accounting solution designed specifically for businesses who sell services to the U.S. Government. Because it is compliant with DCAA and other government requirements for cost accounting systems, Costpoint meets strict financial management and audit requirements. Key features of the accounting system include:

- *Time and Expense System* – Education Northwest uses an electronic time reporting system used by government contractors worldwide. Each employee of Education Northwest prepares an electronic time report semi-monthly. Time is accounted for in hours for each employee by project and subproject numbers assigned to every contract and grant, and their subtasks, as well as internal projects such as those associated with indirect costs. This information is then used to allocate costs such as staff labor, fringe benefits, and occupancy (including information technology, communications, and other direct operating costs not readily attributable to just one cost objective). Timekeeping procedures, such as employee sign-off and management approvals and automated, integrated ledger postings provide visible audit trails.
- *Internal controls and purchasing system* – Education Northwest has established a thorough system of internal control to ensure that charges are properly coded. This includes manager review of charges (timesheets, purchases, travel and expense claims, and other project-related expenses), as well as a reporting system that monthly displays the detail of all charges made to each project. In addition to maintaining procedures to ensure avoidance of purchasing unnecessary items, cost and pricing analyses are

performed to assure adherence to contractual obligations. Education Northwest tracks all expenditures and subcontract agreement commitments for all contracts, grants, and internal costs. Subcontracting vehicles containing standard, and contract/grant-specific terms and conditions are executed ensuring conformance with each of the organization's contracts and grants and with federal regulations.

To complement the automated purchasing system, Education Northwest also maintains an effective estimating system ensuring that clients receive cost-effective products and services. The system budgets at-cost categories necessary to carry out all types of work scopes at any level of complexity. Processes are in place to provide for routine and monthly (at minimum) review and analyses. Staffing charts are maintained to provide for efficient work across all projects. This ensures the most qualified staffing resources are available when needed per project timelines to provide quality services to our clients. These safeguards are critical, allowing nimble modifications to project work and guaranteeing client needs are met with no surprises, as well as providing opportunities for additional services in anticipation of changing scopes. Using these systems, Education Northwest can quickly respond to audit requests, providing sufficient financial data to meet our clients' needs. Finally, we are audited annually by an independent auditing firm.

Year 1: October 1, 2024 – September 30, 2025**1. Personnel****\$653,263**

The table below presents the proposed Education Northwest staff member, percent FTE committed to the project. Staff members to be compensated under Year 1 of the project are as follows:

Title & Role		FTE	Salary
Jennifer Esswein, Ph.D., Program Director for Applied Research and Equitable Evaluation	Co-Director and Project Lead for Idaho's Teacher Mentoring and State Delivered Federal Programs Projects	0.58	\$94,515
Christine Pitts, Ph.D., Senior Fellow	Co-Director and Project Lead for the Regional Native Education Network and Oregon's Language Revitalization Through Early Literacy Tribal Consultation Project	0.58	\$67,935
Lymaris Santana, Ed.D., Principal Consultant, Equity & Systems Improvement for Literacy	Project Manager and Project Lead for Alaska Literacy Project	0.53	\$60,394
Catherine Barbour, M.Ed., Senior Director for Equitable Learning and System Improvement	Quality Assurance Lead	0.12	\$26,626
Jacob Williams, Ph.D., Managing Researcher, Applied Research & Systems Improvement	Project Lead for Learning Standards and Comprehensive School Reform Projects in Montana	0.46	\$57,489
Manuel Vasquez, Ph.D., Managing Researcher, Multilingual Learners	Project Lead for Oregon's Multilingual Strategic Plan Project	0.27	\$30,115
Jennifer Johnson, M.A., Principal Consultant, Equity & Systems Improvement for Multilingual Learners	Project Lead for Washington's Learning Standards and Support for Early Learning and Transitional Kindergarten Projects.	0.39	\$45,262
Mandy Smoker-Broadus, M.F.A., Leader, Native and Culturally Responsive Education	Technical Assistance Provider and Content Expert: Native Education	0.31	\$42,428
Cortney Rowland, Ph.D., Senior Leader, Large Scale Technical Assistance and Teacher Effectiveness	Technical Assistance Provider and Content Expert: Addressing Educator Shortages	0.20	\$30,660

Title & Role		FTE	Salary
RunningHorse Livingston, M.Ed., Managing Consultant, Native and Culturally Responsive Education	Technical Assistance Provider and Content Expert: Mathematics and Native Education	0.25	\$33,897
Elizabeth Gandhi, Ph.D., Managing Researcher	Internal Formative Evaluator and for Stakeholder Engagement, Needs Sensing, and Communications	0.20	\$22,910
Other Personnel	Quality assurance, project management, communications, logistical, financial, and administrative support	1.42	\$141,032

2. Fringe Benefits **\$218,843**

3. Travel **\$54,458**

Estimated travel costs

Destination	Purpose	Trips	Estimated Cost
Washington, DC	Project Director meetings	2 trips x 2 people, 3 nights	\$8,348
Regional	Regional project activities, advisory committee meetings, onsite observations for evaluation and stakeholder engagement	1 trip x 2 people, 2 nights 2 trips x 1 person, 2 nights 2 trips x 2 people, 3 nights	\$12,680
Alaska	Meet with SEA staff; provide technical assistance	4 trips x 1 person, 3 nights	\$7,628
Idaho	Meet with SEA staff; provide technical assistance	4 trip x 1 person, 2 nights	\$5,272
Montana	Meet with SEA staff; provide technical assistance	4 trips x 1 person, 2 nights 2 trips x 2 persons, 2 nights	\$11,548
Oregon	Meet with SEA staff; provide technical assistance	4 trips x 1 person, day trips 2 trips x 2 persons, 2 nights	\$5,868
Washington	Meet with SEA staff; provide technical assistance	2 trips x 1 person, day trips 2 trips x 1 persons, 2 nights	\$3,114

4. Equipment

Not applicable.

5. Supplies **\$500**

6. Contractual **\$1,092,654**

Contractor fees include all labor, preparation, materials, and travel.

Contractual	Estimated FTE	Cost
Concord Evaluation	0.57	\$183,450
Child Trends	1.61	\$458,646
FHI360	1.33	\$331,558
Subject Matter Experts		\$104,000
Advisory Committee		\$15,000

7. Construction

Not applicable.

8. Other **\$279,268****9. Total Direct Costs** **\$2,298,986**

The sum of expenditures, per budget categories one through eight.

10. Indirect Costs **\$758,665****11. Training Stipends**

Not applicable.

12. Total Costs **3,057,651****Year 1 total costs summary**

Category	Cost
Personnel	\$653,263
Fringe Benefits	\$218,843
Travel	\$54,458
Equipment	\$0
Supplies	\$500
Contractual	\$1,092,654
Construction	\$0
Other	\$279,268
Total Direct Costs	\$2,298,986
Indirect Costs	\$758,665
Training Stipends	\$0
Total Costs	\$3,057,651

Budget allocated to cross-state Region 11 and individual state capacity-building strategies

Activity	Description	FTE	Budget
Leadership/Project Coordination/ Quality Assurance	Internal and external project strategy, implementation, and overall management, liaison for key state leaders and oversee project work in those states; assurance of overall quality and client/partner satisfaction.	1.08	\$366,334
Performance Management and Evaluation	Integrate processes and evaluation to routinely improve the quality of our services through systems and tools for performance management, quality assurance and continuous improvement	0.70	\$283,816
Stakeholder engagement, communications, and outreach	Support broad-based engagement, needs sensing, and dissemination of resources and findings with relevant regional and national stakeholders	1.00	\$325,435
Region 11 Native Education Network	Design and launch a regional, cross-state Native education project to support continuous improvement around Native education across Region 11 states	0.48	\$155,990
Alaska Developing Skilled Lifelong Readers: Strong Foundations and Beyond	Continually develop knowledge about early literacy; current research on effective practices; assessments and skills in data analysis; and how to support families, childcare providers, and early childhood educators to scale evidence-based instructional and leadership practices to improve early literacy for students as envisioned in Alaska's Education Challenge and Alaska Reads Act.	0.55	\$207,132
Alaska Addressing Educator Shortages	Collaborate with DEED to support continued implementation of the Teacher Recruitment and Retention (TRR) Action Plan	0.57	\$269,361
Idaho Teacher Mentoring	Support the Idaho SDE to build tools, trainings, and processes based on the Idaho Mentor Program Standards	0.32	\$179,946
Idaho Continuous Improvement for State-Delivered Federal Programs Services	Support the Federal Programs team at SDE to connect program-level inputs, outputs, and outcomes.	0.31	\$78,874
Montana Learning Standards	Support the OPI to create conditions and activities that guide Montana teachers to use the new math standards to drive instructional planning.	0.45	\$152,093

Activity	Description	FTE	Budget
Montana Comprehensive School Reform – More Rigorous Intervention	Co-develop with OPI initial evidence-based guidance and processes for schools to develop and implement improvements and support the OPI to learn from the invested partners in school improvement across the state.	0.59	\$234,660
Oregon Language Revitalization Through Early Literacy Tribal Consultation	Provide TA to the OIE to implement Early Literacy Tribal Grants initiatives	0.51	\$159,085
Oregon Multilingual Learner Reporting Guidance	Help ODE self-assess against grant requirements internal to the state, federal reporting requirements, and how to optimize funding for services benefiting English learners.	0.58	\$214,966
Washington Supporting the Rollout and Implementation of New Learning Standards	Collaborate with OSPI to develop a predictable, replicable, and consistent process to support academic standards implementation. Concurrently, we will build capacity to support future cycles of standards revision, alignment, and implementation	0.34	\$108,939
Washington Support for Early Learning and Expansion of Transitional Kindergarten	Support OSPI to develop and implement a plan to build capacity to scale the Transitional Kindergarten program	0.32	\$168,138
Emerging Needs	5% set-aside to address support emerging needs that are consistent with the proposed project's intended outcomes With approval from the program officer, any remaining funds will be reallocated no later than the end of the third quarter of the budget period	0.59	\$152,882

Year 2: October 1, 2025 – September 30, 2026**1. Personnel****\$661,863**

The table below presents the proposed Education Northwest staff member, percent FTE committed to the project. Staff members to be compensated under Year 2 of the project are as follows:

Title & Role		FTE	Salary
Jennifer Esswein, Ph.D., Program Director for Applied Research and Equitable Evaluation	Co-Director and Project Lead for Idaho's Teacher Mentoring and State Delivered Federal Programs Projects	0.58	\$97,353
Christine Pitts, Ph.D., Senior Fellow	Co-Director and Project Lead for the Regional Native Education Network and Oregon's Language Revitalization Through Early Literacy Tribal Consultation Project	0.58	\$82,915
Lymaris Santana, Ed.D., Principal Consultant, Equity & Systems Improvement for Literacy	Project Manager and Project Lead for Alaska Literacy Project	0.53	\$62,206
Catherine Barbour, M.Ed., Senior Director for Equitable Learning and System Improvement	Quality Assurance Lead	0.12	\$27,425
Jacob Williams, Ph.D., Managing Researcher, Applied Research & Systems Improvement	Project Lead for Learning Standards and Comprehensive School Reform Projects in Montana	0.46	\$59,213
Manuel Vasquez, Ph.D., Managing Researcher, Multilingual Learners	Project Lead for Oregon's Multilingual Strategic Plan Project	0.27	\$31,018
Jennifer Johnson, M.A., Principal Consultant, Equity & Systems Improvement for Multilingual Learners	Project Lead for Washington's Learning Standards and Support for Early Learning and Transitional Kindergarten Projects.	0.39	\$46,620
Mandy Smoker-Broadus, M.F.A., Leader, Native and Culturally Responsive Education	Technical Assistance Provider and Content Expert: Native Education	0.31	\$43,700
Cortney Rowland, Ph.D., Senior Leader, Large Scale Technical Assistance and Teacher Effectiveness	Technical Assistance Provider and Content Expert: Addressing Educator Shortages	0.20	\$31,580

Title & Role		FTE	Salary
RunningHorse Livingston, M.Ed., Managing Consultant, Native and Culturally Responsive Education	Technical Assistance Provider and Content Expert: Mathematics and Native Education	0.25	\$34,914
Elizabeth Gandhi, Ph.D., Managing Researcher	Internal Formative Evaluator and for Stakeholder Engagement, Needs Sensing, and Communications	0.20	\$23,597
Other Personnel	Quality assurance, project management, communications, logistical, financial, and administrative support	1.20	\$121,322

2. Fringe Benefits **\$221,724**

3. Travel **\$54,458**

Estimated travel costs

Destination	Purpose	Trips	Estimated Cost
Washington, DC	Project Director meetings	2 trips x 2 people, 3 nights	\$8,348
Regional	Regional project activities, advisory committee meetings, onsite observations for evaluation and stakeholder engagement	1 trip x 2 people, 2 nights 2 trips x 1 person, 2 nights 2 trips x 2 people, 3 nights	\$12,680
Alaska	Meet with SEA staff; provide technical assistance	4 trips x 1 person, 3 nights	\$7,628
Idaho	Meet with SEA staff; provide technical assistance	4 trip x 1 person, 2 nights	\$5,272
Montana	Meet with SEA staff; provide technical assistance	4 trips x 1 person, 2 nights 2 trips x 2 persons, 2 nights	\$11,548
Oregon	Meet with SEA staff; provide technical assistance	4 trips x 1 person, day trips 2 trips x 2 persons, 2 nights	\$5,868
Washington	Meet with SEA staff; provide technical assistance	2 trips x 1 person, day trips 2 trips x 1 persons, 2 nights	\$3,114

4. Equipment

Not applicable.

5. Supplies **\$500**

6. Contractual **\$1,092,654**

Contractor fees include fully loaded labor costs, materials and travel.

Contractual	Estimated FTE	Cost
Concord Evaluation	0.55	\$183,450
Child Trends	1.54	\$458,646
FHI360	1.29	\$331,558
Subject Matter Experts		\$104,000
Advisory Committee		\$15,000

7. Construction

Not applicable.

8. Other **\$267,787****9. Total Direct Costs** **\$2,298,986**

The sum of expenditures, per budget categories one through eight.

10. Indirect Costs **\$758,665****11. Training Stipends**

Not applicable.

12. Total Costs **3,057,651****Year 2 total costs summary**

Category	Cost
Personnel	\$661,863
Fringe Benefits	\$221,724
Travel	\$54,458
Equipment	\$0
Supplies	\$500
Contractual	\$1,092,654
Construction	\$0
Other	\$267,787
Total Direct Costs	\$2,298,986
Indirect Costs	\$758,665
Training Stipends	\$0
Total Costs	\$3,057,651

Budget allocated to cross-state Region 11 and individual state capacity-building strategies

Activity	Description	FTE	Budget
Leadership/Project Coordination/Quality Assurance	Internal and external project strategy, implementation, and overall management, liaison for key state leaders and oversee project work in those states; assurance of overall quality and client/partner satisfaction.	1.09	\$389,260
Performance Management and Evaluation	Integrate processes and evaluation to routinely improve the quality of our services through systems and tools for performance management, quality assurance and continuous improvement	0.70	\$284,611
Stakeholder engagement, communications, and outreach	Support broad-based engagement, needs sensing, and dissemination of resources and findings with relevant regional and national stakeholders	0.99	\$324,587
Region 11 Native Education Network	Design and launch a regional, cross-state Native education project to support continuous improvement around Native education across Region 11 states	0.46	\$158,429
Alaska Developing Skilled Lifelong Readers: Strong Foundations and Beyond	Continually develop knowledge about early literacy; current research on effective practices; assessments and skills in data analysis; and how to support families, childcare providers, and early childhood educators to scale evidence-based instructional and leadership practices to improve early literacy for students as envisioned in Alaska's Education Challenge and Alaska Reads Act.	0.53	\$204,204
Alaska Addressing Educator Shortages	Collaborate with DEED to support continued implementation of the Teacher Recruitment and Retention (TRR) Action Plan	0.55	\$266,439
Idaho Teacher Mentoring	Support the Idaho SDE to build tools, trainings, and processes based on the Idaho Mentor Program Standards	0.30	\$176,147
Idaho Continuous Improvement for State-Delivered Federal Programs Services	Support the Federal Programs team at SDE to connect program-level inputs, outputs, and outcomes.	0.29	\$75,287
Montana Learning Standards	Support the OPI to create conditions and activities that guide Montana teachers to use the new math standards to drive instructional planning.	0.43	\$149,953

Activity	Description	FTE	Budget
Montana Comprehensive School Reform – More Rigorous Intervention	Co-develop with OPI initial evidence-based guidance and processes for schools to develop and implement improvements and support the OPI to learn from the invested partners in school improvement across the state.	0.57	\$232,317
Oregon Language Revitalization Through Early Literacy Tribal Consultation	Provide TA to the OIE to implement Early Literacy Tribal Grants initiatives	0.49	\$161,305
Oregon Multilingual Learner Reporting Guidance	Help ODE self-assess against grant requirements internal to the state, federal reporting requirements, and how to optimize funding for services benefiting English learners.	0.56	\$211,992
Washington Supporting the Rollout and Implementation of New Learning Standards	Collaborate with OSPI to develop a predictable, replicable, and consistent process to support academic standards implementation. Concurrently, we will build capacity to support future cycles of standards revision, alignment, and implementation	0.33	\$106,029
Washington Support for Early Learning and Expansion of Transitional Kindergarten	Support OSPI to develop and implement a plan to build capacity to scale the Transitional Kindergarten program	0.30	\$164,209
Emerging Needs	5% set-aside to address support emerging needs that are consistent with the proposed project's intended outcomes With approval from the program officer, any remaining funds will be reallocated no later than the end of the third quarter of the budget period	0.57	\$152,882

Year 3: October 1, 2026 – September 30, 2027**1. Personnel****\$666,972**

The table below presents the proposed Education Northwest staff member, percent FTE committed to the project. Staff members to be compensated under Year 3 of the project are as follows:

Title & Role		FTE	Salary
Jennifer Esswein, Ph.D., Program Director for Applied Research and Equitable Evaluation	Co-Director and Project Lead for Idaho's Teacher Mentoring and State Delivered Federal Programs Projects	0.58	\$100,272
Christine Pitts, Ph.D., Senior Fellow	Co-Director and Project Lead for the Regional Native Education Network and Oregon's Language Revitalization Through Early Literacy Tribal Consultation Project	0.58	\$85,402
Lymaris Santana, Ed.D., Principal Consultant, Equity & Systems Improvement for Literacy	Project Manager and Project Lead for Alaska Literacy Project	0.53	\$64,072
Catherine Barbour, M.Ed., Senior Director for Equitable Learning and System Improvement	Quality Assurance Lead	0.12	\$28,509
Jacob Williams, Ph.D., Managing Researcher, Applied Research & Systems Improvement	Project Lead for Learning Standards and Comprehensive School Reform Projects in Montana	0.45	\$60,237
Manuel Vasquez, Ph.D., Managing Researcher, Multilingual Learners	Project Lead for Oregon's Multilingual Strategic Plan Project	0.25	\$29,595
Jennifer Johnson, M.A., Principal Consultant, Equity & Systems Improvement for Multilingual Learners	Project Lead for Washington's Learning Standards and Support for Early Learning and Transitional Kindergarten Projects.	0.38	\$46,625
Mandy Smoker-Broadus, M.F.A., Leader, Native and Culturally Responsive Education	Technical Assistance Provider and Content Expert: Native Education	0.30	\$44,844
Cortney Rowland, Ph.D., Senior Leader, Large Scale Technical Assistance and Teacher Effectiveness	Technical Assistance Provider and Content Expert: Addressing Educator Shortages	0.19	\$31,203

Title & Role		FTE	Salary
RunningHorse Livingston, M.Ed., Managing Consultant, Native and Culturally Responsive Education	Technical Assistance Provider and Content Expert: Mathematics and Native Education	0.24	\$34,963
Elizabeth Gandhi, Ph.D., Managing Researcher	Internal Formative Evaluator and for Stakeholder Engagement, Needs Sensing, and Communications	0.19	\$22,648
Other Personnel	Quality assurance, project management, communications, logistical, financial, and administrative support	1.13	\$118,602

2. Fringe Benefits **\$223,435**

3. Travel **\$54,458**

Estimated travel costs

Destination	Purpose	Trips	Estimated Cost
Washington, DC	Project Director meetings	2 trips x 2 people, 3 nights	\$8,348
Regional	Regional project activities, advisory committee meetings, onsite observations for evaluation and stakeholder engagement	1 trip x 2 people, 2 nights 2 trips x 1 person, 2 nights 2 trips x 2 people, 3 nights	\$12,680
Alaska	Meet with SEA staff; provide technical assistance	4 trips x 1 person, 3 nights	\$7,628
Idaho	Meet with SEA staff; provide technical assistance	4 trip x 1 person, 2 nights	\$5,272
Montana	Meet with SEA staff; provide technical assistance	4 trips x 1 person, 2 nights 2 trips x 2 persons, 2 nights	\$11,548
Oregon	Meet with SEA staff; provide technical assistance	4 trips x 1 person, day trips 2 trips x 2 persons, 2 nights	\$5,868
Washington	Meet with SEA staff; provide technical assistance	2 trips x 1 person, day trips 2 trips x 1 persons, 2 nights	\$3,114

4. Equipment

Not applicable.

5. Supplies **\$500**

6. Contractual **\$1,092,654**

Contractor fees include fully loaded labor costs, materials and travel.

Contractual	Estimated FTE	Cost
Concord Evaluation	.53	\$183,450
Child Trends	1.47	\$458,646
FHI360	1.25	\$331,558
Subject Matter Experts		\$104,000
Advisory Committee		\$15,000

7. Construction

Not applicable.

8. Other **\$260,967****9. Total Direct Costs** **\$2,298,986**

The sum of expenditures, per budget categories one through eight.

10. Indirect Costs **\$758,665****11. Training Stipends**

Not applicable.

12. Total Costs **3,057,651****Year 3 total costs summary**

Category	Cost
Personnel	\$666,972
Fringe Benefits	\$223,435
Travel	\$54,458
Equipment	\$0
Supplies	\$500
Contractual	\$1,092,654
Construction	\$0
Other	\$260,967
Total Direct Costs	\$2,298,985
Indirect Costs	\$758,665
Training Stipends	\$0
Total Costs	\$3,057,651

Budget allocated to cross-state Region 11 and individual state capacity-building strategies

Activity	Description	FTE	Budget
Leadership/Project Coordination/Quality Assurance	. Internal and external project strategy, implementation, and overall management, liaison for key state leaders and oversee project work in those states; assurance of overall quality and client/partner satisfaction.	1.07	\$394,528
Performance Management and Evaluation	. Integrate processes and evaluation to routinely improve the quality of our services through systems and tools for performance management, quality assurance and continuous improvement	0.70	\$285,430
Stakeholder engagement, communications, and outreach	. Support broad-based engagement, needs sensing, and dissemination of resources and findings with relevant regional and national stakeholders	0.98	\$321,469
Region 11 Native Education Network	. Design and launch a regional, cross-state Native education project to support continuous improvement around Native education across Region 11 states	0.45	\$159,472
Alaska Developing Skilled Lifelong Readers: Strong Foundations and Beyond	. Continually develop knowledge about early literacy; current research on effective practices; assessments and skills in data analysis; and how to support families, childcare providers, and early childhood educators to scale evidence-based instructional and leadership practices to improve early literacy for students as envisioned in Alaska's Education Challenge and Alaska Reads Act.	0.53	\$205,334
Alaska Addressing Educator Shortages	. Collaborate with DEED to support continued implementation of the Teacher Recruitment and Retention (TRR) Action Plan	0.54	\$263,458
Idaho Teacher Mentoring	. Support the Idaho SDE to build tools, trainings, and processes based on the Idaho Mentor Program Standards	0.30	\$176,804
Idaho Continuous Improvement for State-Delivered Federal Programs Services	. Support the Federal Programs team at SDE to connect program-level inputs, outputs, and outcomes.	0.29	\$75,901
Montana Learning Standards	. Support the OPI to create conditions and activities that guide Montana teachers to use the new math standards to drive instructional planning.	0.42	\$150,816

Activity	Description	FTE	Budget
Montana Comprehensive School Reform – More Rigorous Intervention	Co-develop with OPI initial evidence-based guidance and processes for schools to develop and implement improvements and support the OPI to learn from the invested partners in school improvement across the state.	0.56	\$232,609
Oregon Language Revitalization Through Early Literacy Tribal Consultation	Provide TA to the OIE to implement Early Literacy Tribal Grants initiatives	0.48	\$162,786
Oregon Multilingual Learner Reporting Guidance	Help ODE self-assess against grant requirements internal to the state, federal reporting requirements, and how to optimize funding for services benefiting English learners.	0.54	\$207,315
Washington Supporting the Rollout and Implementation of New Learning Standards	Collaborate with OSPI to develop a predictable, replicable, and consistent process to support academic standards implementation. Concurrently, we will build capacity to support future cycles of standards revision, alignment, and implementation	0.31	\$104,252
Washington Support for Early Learning and Expansion of Transitional Kindergarten	Support OSPI to develop and implement a plan to build capacity to scale the Transitional Kindergarten program	0.30	\$164,654
Emerging Needs	5% set-aside to address support emerging needs that are consistent with the proposed project's intended outcomes With approval from the program officer, any remaining funds will be reallocated no later than the end of the third quarter of the budget period	0.56	\$152,822

Year 4: October 1, 2027 – September 30, 2028**1. Personnel****\$671,814**

The table below presents the proposed Education Northwest staff member, percent FTE committed to the project. Staff members to be compensated under Year 4 of the project are as follows:

Title & Role		FTE	Salary
Jennifer Esswein, Ph.D., Program Director for Applied Research and Equitable Evaluation	Co-Director and Project Lead for Idaho's Teacher Mentoring and State Delivered Federal Programs Projects	0.57	\$102,874
Christine Pitts, Ph.D., Senior Fellow	Co-Director and Project Lead for the Regional Native Education Network and Oregon's Language Revitalization Through Early Literacy Tribal Consultation Project	0.57	\$87,443
Lymaris Santana, Ed.D., Principal Consultant, Equity & Systems Improvement for Literacy	Project Manager and Project Lead for Alaska Literacy Project	0.52	\$65,141
Catherine Barbour, M.Ed., Senior Director for Equitable Learning and System Improvement	Quality Assurance Lead	0.12	\$29,095
Jacob Williams, Ph.D., Managing Researcher, Applied Research & Systems Improvement	Project Lead for Learning Standards and Comprehensive School Reform Projects in Montana	0.44	\$59,717
Manuel Vasquez, Ph.D., Managing Researcher, Multilingual Learners	Project Lead for Oregon's Multilingual Strategic Plan Project	0.24	\$29,097
Jennifer Johnson, M.A., Principal Consultant, Equity & Systems Improvement for Multilingual Learners	Project Lead for Washington's Learning Standards and Support for Early Learning and Transitional Kindergarten Projects.	0.38	\$48,454
Mandy Smoker-Broadus, M.F.A., Leader, Native and Culturally Responsive Education	Technical Assistance Provider and Content Expert: Native Education	0.29	\$44,462
Cortney Rowland, Ph.D., Senior Leader, Large Scale Technical Assistance and Teacher Effectiveness	Technical Assistance Provider and Content Expert: Addressing Educator Shortages	0.19	\$32,328

Title & Role		FTE	Salary
RunningHorse Livingston, M.Ed., Managing Consultant, Native and Culturally Responsive Education	Technical Assistance Provider and Content Expert: Mathematics and Native Education	0.23	\$34,468
Elizabeth Gandhi, Ph.D., Managing Researcher	Internal Formative Evaluator and for Stakeholder Engagement, Needs Sensing, and Communications	0.18	\$22,972
Other Personnel	Quality assurance, project management, communications, logistical, financial, and administrative support	1.07	\$115,763

2. Fringe Benefits **\$225,057**

3. Travel **\$54,458**

Estimated travel costs

Destination	Purpose	Trips	Estimated Cost
Washington, DC	Project Director meetings	2 trips x 2 people, 3 nights	\$8,348
Regional	Regional project activities, advisory committee meetings, onsite observations for evaluation and stakeholder engagement	1 trip x 2 people, 2 nights 2 trips x 1 person, 2 nights 2 trips x 2 people, 3 nights	\$12,680
Alaska	Meet with SEA staff; provide technical assistance	4 trips x 1 person, 3 nights	\$7,628
Idaho	Meet with SEA staff; provide technical assistance	4 trip x 1 person, 2 nights	\$5,272
Montana	Meet with SEA staff; provide technical assistance	4 trips x 1 person, 2 nights 2 trips x 2 persons, 2 nights	\$11,548
Oregon	Meet with SEA staff; provide technical assistance	4 trips x 1 person, day trips 2 trips x 2 persons, 2 nights	\$5,868
Washington	Meet with SEA staff; provide technical assistance	2 trips x 1 person, day trips 2 trips x 1 persons, 2 nights	\$3,114

4. Equipment

Not applicable.

5. Supplies **\$500**

6. Contractual **\$1,092,654**

Contractor fees include fully loaded labor costs, materials and travel.

Contractual	Estimated FTE	Cost
Concord Evaluation	.52	\$183,450
Child Trends	1.40	\$458,646
FHI360	1.21	\$331,558
Subject Matter Experts		\$104,000
Advisory Committee		\$15,000

7. Construction

Not applicable.

8. Other **\$254,503****9. Total Direct Costs** **\$2,298,986**

The sum of expenditures, per budget categories one through eight.

10. Indirect Costs **\$758,665****11. Training Stipends**

Not applicable.

12. Total Costs **3,057,651****Year 4 total costs summary**

Category	Cost
Personnel	\$671,814
Fringe Benefits	\$225,057
Travel	\$54,458
Equipment	\$0
Supplies	\$500
Contractual	\$1,092,654
Construction	\$0
Other	\$254,503
Total Direct Costs	\$2,298,986
Indirect Costs	\$758,665
Training Stipends	\$0
Total Costs	\$3,057,651

Budget allocated to cross-state Region 11 and individual state capacity-building strategies

Activity	Description	FTE	Budget
Leadership/Project Coordination/Quality Assurance	Internal and external project strategy, implementation, and overall management, liaison for key state leaders and oversee project work in those states; assurance of overall quality and client/partner satisfaction.	1.07	\$402,241
Performance Management and Evaluation	Integrate processes and evaluation to routinely improve the quality of our services through systems and tools for performance management, quality assurance and continuous improvement	0.70	\$286,511
Stakeholder engagement, communications, and outreach	Support broad-based engagement, needs sensing, and dissemination of resources and findings with relevant regional and national stakeholders	0.97	\$319,370
Region 11 Native Education Network	Design and launch a regional, cross-state Native education project to support continuous improvement around Native education across Region 11 states	0.42	\$153,196
Alaska Developing Skilled Lifelong Readers: Strong Foundations and Beyond	Continually develop knowledge about early literacy; current research on effective practices; assessments and skills in data analysis; and how to support families, childcare providers, and early childhood educators to scale evidence-based instructional and leadership practices to improve early literacy for students as envisioned in Alaska's Education Challenge and Alaska Reads Act.	0.52	\$205,331
Alaska Addressing Educator Shortages	Collaborate with DEED to support continued implementation of the Teacher Recruitment and Retention (TRR) Action Plan	0.53	\$264,779
Idaho Teacher Mentoring	Support the Idaho SDE to build tools, trainings, and processes based on the Idaho Mentor Program Standards	0.29	\$176,049
Idaho Continuous Improvement for State-Delivered Federal Programs Services	Support the Federal Programs team at SDE to connect program-level inputs, outputs, and outcomes.	0.28	\$75,708
Montana Learning Standards	Support the OPI to create conditions and activities that guide Montana teachers to use the new math standards to drive instructional planning.	0.41	\$151,003

Activity	Description	FTE	Budget
Montana Comprehensive School Reform – More Rigorous Intervention	Co-develop with OPI initial evidence-based guidance and processes for schools to develop and implement improvements and support the OPI to learn from the invested partners in school improvement across the state.	0.54	\$230,203
Oregon Language Revitalization Through Early Literacy Tribal Consultation	Provide TA to the OIE to implement Early Literacy Tribal Grants initiatives	0.47	\$162,982
Oregon Multilingual Learner Reporting Guidance	Help ODE self-assess against grant requirements internal to the state, federal reporting requirements, and how to optimize funding for services benefiting English learners.	0.52	\$204,658
Washington Supporting the Rollout and Implementation of New Learning Standards	Collaborate with OSPI to develop a predictable, replicable, and consistent process to support academic standards implementation. Concurrently, we will build capacity to support future cycles of standards revision, alignment, and implementation	0.32	\$108,221
Washington Support for Early Learning and Expansion of Transitional Kindergarten	Support OSPI to develop and implement a plan to build capacity to scale the Transitional Kindergarten program	0.30	\$164,517
Emerging Needs	5% set-aside to address support emerging needs that are consistent with the proposed project's intended outcomes With approval from the program officer, any remaining funds will be reallocated no later than the end of the third quarter of the budget period	0.55	\$152,882

Year 5: October 1, 2028 – September 30, 2029**1. Personnel****\$676,780**

The table below presents the proposed Education Northwest staff member, percent FTE committed to the project. Staff members to be compensated under Year 5 of the project are as follows:

Title & Role		FTE	Salary
Jennifer Esswein, Ph.D., Program Director for Applied Research and Equitable Evaluation	Co-Director and Project Lead for Idaho's Teacher Mentoring and State Delivered Federal Programs Projects	0.57	\$105,538
Christine Pitts, Ph.D., Senior Fellow	Co-Director and Project Lead for the Regional Native Education Network and Oregon's Language Revitalization Through Early Literacy Tribal Consultation Project	0.57	\$89,529
Lymaris Santana, Ed.D., Principal Consultant, Equity & Systems Improvement for Literacy	Project Manager and Project Lead for Alaska Literacy Project	0.51	\$66,363
Catherine Barbour, M.Ed., Senior Director for Equitable Learning and System Improvement	Quality Assurance Lead	0.12	\$29,968
Jacob Williams, Ph.D., Managing Researcher, Applied Research & Systems Improvement	Project Lead for Learning Standards and Comprehensive School Reform Projects in Montana	0.42	\$59,112
Manuel Vasquez, Ph.D., Managing Researcher, Multilingual Learners	Project Lead for Oregon's Multilingual Strategic Plan Project	0.23	\$29,399
Jennifer Johnson, M.A., Principal Consultant, Equity & Systems Improvement for Multilingual Learners	Project Lead for Washington's Learning Standards and Support for Early Learning and Transitional Kindergarten Projects.	0.37	\$48,503
Mandy Smoker-Broadus, M.F.A., Leader, Native and Culturally Responsive Education	Technical Assistance Provider and Content Expert: Native Education	0.29	\$45,529
Cortney Rowland, Ph.D., Senior Leader, Large Scale Technical Assistance and Teacher Effectiveness	Technical Assistance Provider and Content Expert: Addressing Educator Shortages	0.19	\$33,103

Title & Role		FTE	Salary
RunningHorse Livingston, M.Ed., Managing Consultant, Native and Culturally Responsive Education	Technical Assistance Provider and Content Expert: Mathematics and Native Education	0.22	\$34,443
Elizabeth Gandhi, Ph.D., Managing Researcher	Internal Formative Evaluator and for Stakeholder Engagement, Needs Sensing, and Communications	0.18	\$23,295
Other Personnel	Quality assurance, project management, communications, logistical, financial, and administrative support	1.00	\$111,998

2. Fringe Benefits **\$226,721**

3. Travel **\$54,458**

Estimated travel costs

Destination	Purpose	Trips	Estimated Cost
Washington, DC	Project Director meetings	2 trips x 2 people, 3 nights	\$8,348
Regional	Regional project activities, advisory committee meetings, onsite observations for evaluation and stakeholder engagement	1 trip x 2 people, 2 nights 2 trips x 1 person, 2 nights 2 trips x 2 people, 3 nights	\$12,680
Alaska	Meet with SEA staff; provide technical assistance	4 trips x 1 person, 3 nights	\$7,628
Idaho	Meet with SEA staff; provide technical assistance	4 trip x 1 person, 2 nights	\$5,272
Montana	Meet with SEA staff; provide technical assistance	4 trips x 1 person, 2 nights 2 trips x 2 persons, 2 nights	\$11,548
Oregon	Meet with SEA staff; provide technical assistance	4 trips x 1 person, day trips 2 trips x 2 persons, 2 nights	\$5,868
Washington	Meet with SEA staff; provide technical assistance	2 trips x 1 person, day trips 2 trips x 1 persons, 2 nights	\$3,114

4. Equipment

Not applicable.

5. Supplies **\$500**

6. Contractual **\$1,092,65**

Contractor fees include fully loaded labor costs, materials and travel.

Contractual	Estimated FTE	Cost
Concord Evaluation	.49	\$183,450
Child Trends	1.34	\$458,646
FHI360	1.14	\$331,558
Subject Matter Experts		\$104,000
Advisory Committee		\$15,000

7. Construction

Not applicable.

8. Other **\$247,873****9. Total Direct Costs** **\$2,298,986**

The sum of expenditures, per budget categories one through eight.

10. Indirect Costs **\$758,665****11. Training Stipends**

Not applicable.


12. Total Costs **3,057,651****Year 5 total costs summary**

Category	Cost
Personnel	\$676,780
Fringe Benefits	\$226,721
Travel	\$54,458
Equipment	\$0
Supplies	\$500
Contractual	\$1,092,654
Construction	\$0
Other	\$247,873
Total Direct Costs	\$2,298,986
Indirect Costs	\$758,665
Training Stipends	\$0
Total Costs	\$3,057,651

Budget allocated to cross-state Region 11 and individual state capacity-building strategies

Activity	Description	FTE	Budget
Leadership/Project Coordination/Quality Assurance	Internal and external project strategy, implementation, and overall management, liaison for key state leaders and oversee project work in those states; assurance of overall quality and client/partner satisfaction.	1.06	\$410,097
Performance Management and Evaluation	Integrate processes and evaluation to routinely improve the quality of our services through systems and tools for performance management, quality assurance and continuous improvement	0.70	\$287,142
Stakeholder engagement, communications, and outreach	Support broad-based engagement, needs sensing, and dissemination of resources and findings with relevant regional and national stakeholders	0.95	\$316,706
Region 11 Native Education Network	Design and launch a regional, cross-state Native education project to support continuous improvement around Native education across Region 11 states	0.41	\$153,431
Alaska Developing Skilled Lifelong Readers: Strong Foundations and Beyond	Continually develop knowledge about early literacy; current research on effective practices; assessments and skills in data analysis; and how to support families, childcare providers, and early childhood educators to scale evidence-based instructional and leadership practices to improve early literacy for students as envisioned in Alaska's Education Challenge and Alaska Reads Act.	0.52	\$205,480
Alaska Addressing Educator Shortages	Collaborate with DEED to support continued implementation of the Teacher Recruitment and Retention (TRR) Action Plan	0.53	\$266,517
Idaho Teacher Mentoring	Support the Idaho SDE to build tools, trainings, and processes based on the Idaho Mentor Program Standards	0.29	\$175,142
Idaho Continuous Improvement for State-Delivered Federal Programs Services	Support the Federal Programs team at SDE to connect program-level inputs, outputs, and outcomes.	0.28	\$75,874
Montana Learning Standards	Support the OPI to create conditions and activities that guide Montana teachers to use the new math standards to drive instructional planning.	0.39	\$148,163

Activity	Description	FTE	Budget
Montana Comprehensive School Reform – More Rigorous Intervention	Co-develop with OPI initial evidence-based guidance and processes for schools to develop and implement improvements and support the OPI to learn from the invested partners in school improvement across the state.	0.53	\$228,642
Oregon Language Revitalization Through Early Literacy Tribal Consultation	Provide TA to the OIE to implement Early Literacy Tribal Grants initiatives	0.46	\$161,653
Oregon Multilingual Learner Reporting Guidance	Help ODE self-assess against grant requirements internal to the state, federal reporting requirements, and how to optimize funding for services benefiting English learners.	0.51	\$204,492
Washington Supporting the Rollout and Implementation of New Learning Standards	Collaborate with OSPI to develop a predictable, replicable, and consistent process to support academic standards implementation. Concurrently, we will build capacity to support future cycles of standards revision, alignment, and implementation	0.32	\$109,727
Washington Support for Early Learning and Expansion of Transitional Kindergarten	Support OSPI to develop and implement a plan to build capacity to scale the Transitional Kindergarten program	0.29	\$161,703
Emerging Needs	5% set-aside to address support emerging needs that are consistent with the proposed project's intended outcomes With approval from the program officer, any remaining funds will be reallocated no later than the end of the third quarter of the budget period	0.54	\$152,882



U.S. DEPARTMENT OF EDUCATION

BUDGET INFORMATION

NON-CONSTRUCTION PROGRAMS

OMB Number: 1894-0008

Expiration Date: 08/31/2026

Name of Institution/Organization

Education Northwest

Applicants requesting funding for only one year should complete the column under "Project Year 1." Applicants requesting funding for multi-year grants should complete all applicable columns. Please read all instructions before completing form.

SECTION A - BUDGET SUMMARY

U.S. DEPARTMENT OF EDUCATION FUNDS

Budget Categories	Project Year 1 (a)	Project Year 2 (b)	Project Year 3 (c)	Project Year 4 (d)	Project Year 5 (e)	Project Year 6 (f)	Project Year 7 (g)	Total (h)
1. Personnel	653,263.00	661,863.00	666,972.00	671,814.00	676,780.00			3,330,692.00
2. Fringe Benefits	218,843.00	221,724.00	223,435.00	225,057.00	226,721.00			1,115,780.00
3. Travel	54,458.00	54,458.00	54,458.00	54,458.00	54,458.00			272,290.00
4. Equipment	0.00	0.00	0.00	0.00	0.00			0.00
5. Supplies	500.00	500.00	500.00	500.00	500.00			2,500.00
6. Contractual	1,092,654.00	1,092,654.00	1,092,654.00	1,092,654.00	1,092,654.00			5,463,270.00
7. Construction	0.00	0.00	0.00	0.00	0.00			0.00
8. Other	279,268.00	267,787.00	260,967.00	254,503.00	247,873.00			1,310,398.00
9. Total Direct Costs (lines 1-8)	2,298,986.00	2,298,986.00	2,298,986.00	2,298,986.00	2,298,986.00			11,494,930.00
10. Indirect Costs*	758,665.00	758,665.00	758,665.00	758,665.00	758,665.00			3,793,325.00
11. Training Stipends								
12. Total Costs (lines 9-11)	3,057,651.00	3,057,651.00	3,057,651.00	3,057,651.00	3,057,651.00			15,288,255.00

*Indirect Cost Information (To Be Completed by Your Business Office):

If you are requesting reimbursement for indirect costs on line 10, please answer the following questions:

(1) Do you have an Indirect Cost Rate Agreement approved by the Federal government?

☒ Yes ☐ No

(2) If yes, please provide the following information:

Period Covered by the Indirect Cost Rate Agreement: From: 01/01/2024 To: 12/31/2024 (mm/dd/yyyy)

Approving Federal agency: ☒ ED ☐ Other (please specify):

The Indirect Cost Rate is 33.00 %.

(3) If this is your first Federal grant, and you do not have an approved indirect cost rate agreement, are not a State, Local government or Indian Tribe, and are not funded under a training rate program or a restricted rate program, do you want to use the de minimis rate of 10% of MTDC?

☐ Yes ☐ No If yes, you must comply with the requirements of 2 CFR § 200.414(f).

(4) If you do not have an approved indirect cost rate agreement, do you want to use the temporary rate of 10% of budgeted salaries and wages?

☐ Yes ☐ No If yes, you must submit a proposed indirect cost rate agreement within 90 days after the date your grant is awarded, as required by 34 CFR § 75.560.

(5) For Restricted Rate Programs (check one) -- Are you using a restricted indirect cost rate that:

☐ Is included in your approved Indirect Cost Rate Agreement? Or, ☐ Complies with 34 CFR 76.564(c)(2)? The Restricted Indirect Cost Rate is %.

(6) For Training Rate Programs (check one) -- Are you using a rate that:

☐ Is based on the training rate of 8 percent of MTDC (See EDGAR § 75.562(c)(4))? Or, ☐ training rate of 8 percent of MTDC (See EDGAR § 75.562(c)(4))? **ED 001773**

ED 524

Tracking Number: GRANT14194533

Funding Opportunity Number: ED-GRANTS-051324-001

Received Date: Jun 24, 2024 03:10:25 PM EDT

Name of Institution/Organization Education Northwest		Applicants requesting funding for only one year should complete the column under "Project Year 1." Applicants requesting funding for multi-year grants should complete all applicable columns. Please read all instructions before completing form.									
SECTION B - BUDGET SUMMARY NON-FEDERAL FUNDS											
Budget Categories	Project Year 1 (a)	Project Year 2 (b)	Project Year 3 (c)	Project Year 4 (d)	Project Year 5 (e)	Project Year 6 (f)	Project Year 7 (g)	Total (h)			
1. Personnel											
2. Fringe Benefits											
3. Travel											
4. Equipment											
5. Supplies											
6. Contractual											
7. Construction											
8. Other											
9. Total Direct Costs (lines 1-8)											
10. Indirect Costs											
11. Training Stipends											
12. Total Costs (lines 9-11)											
SECTION C - BUDGET NARRATIVE (see instructions)											

ED 524

PR/Award # S283B240076

Page e495

Tracking Number: GRANT14194533

Funding Opportunity Number: ED-GRANTS-051324-001 Received Date: Jun 24, 2024 03:10:25 PM EDT

ED 001774

Name of Institution/Organization Education Northwest	Applicants requesting funding for only one year should complete the column under "Project Year 1." Applicants requesting funding for multi-year grants should complete all applicable columns. Please read all instructions before completing form.							
IF APPLICABLE: SECTION D - LIMITATION ON ADMINISTRATIVE EXPENSES								
(1) List administrative cost cap (x%): <input style="width: 50px;" type="text"/>								
(2) What does your administrative cost cap apply to? <input type="checkbox"/> (a) indirect and direct costs or, <input type="checkbox"/> (b) only direct costs								
Budget Categories	Project Year 1 (a)	Project Year 2 (b)	Project Year 3 (c)	Project Year 4 (d)	Project Year 5 (e)	Project Year 6 (f)	Project Year 7 (g)	Total (h)
1. Personnel Administrative								
2. Fringe Benefits Administrative								
3. Travel Administrative								
4. Contractual Administrative								
5. Construction Administrative								
6. Other Administrative								
7. Total Direct Administrative Costs (lines 1-6)								
8. Indirect Costs								
9. Total Administrative Costs								
10. Total Percentage of Administrative Costs								

ED 524

PR/Award # S283B240076

Page e496

Tracking Number: GRANT14194533

Funding Opportunity Number: ED-GRANTS-051324-001 Received Date: Jun 24, 2024 03:10:25 PM EDT

ED 001775

U.S. Department of Education Supplemental Information for the SF-424
Application for Federal Assistance**1. Project Director and Applicable Entity Identification Numbers:**

Prefix:	* First Name:	Middle Name:	* Last Name:	Suffix:
	Jennifer		Esswein	Ph.D.

* Project Director Level of Effort (percentage of time devoted to grant): 58

Address:

* Street1:	1417 NW Everett Street, Suite 310
Street2:	
* City:	Portland
County:	Multnomah
* State:	OR: Oregon
* Zip Code:	97209-2653
* Country:	USA: UNITED STATES

* Phone Number (give area code) Fax Number (give area code)

503275.9500	
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* Email Address:

jennifer.esswein@ednw.org

Alternate Email Address:

--

OPE ID(s) (if applicable)

--

NCES School ID(s) (if applicable)

--

NCES LEA/School District ID(s) (if applicable)

--

2. New Potential Grantee or Novice Applicant:

- ☐ N/A. This item is not applicable because the program competition's notice inviting applications (NIA) does not include a definition of either "New Potential Grantee" or "Novice Applicant." This item is not applicable when the program competition's NIA does not include either definition.

For NIA's that include a definition of "New Potential Grantee" or "Novice Applicant," complete the following:

a. Are you either a new potential grantee or novice applicant as defined in the program competition's NIA?

☐ Yes ☒ No

3. Human Subjects Research:

a. Are any research activities involving human subjects planned at any time during the proposed Project Period?

☐ Yes ☒ No

b. Are ALL the research activities proposed designated to be exempt from the regulations?

☐ Yes Provide Exemption(s) #(s): ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6 ☐ 7 ☐ 8

☐ No Provide Federal Wide Assurance #(s), if available:

c. If applicable, please attach your "Exempt Research" or "Nonexempt Research" narrative to this form as indicated in the definitions page in the attached instructions.

Add Attachment

Delete Attachment

View Attachment

4. Infrastructure Programs and Build America, Buy America Act Applicability:

If the competition Notice Inviting Applications (NIA) in section III. 4. "Other" states that the program under which this application is submitted is subject to the Build America, Buy America Act (Pub. L. 117-58) (BABAA) domestic sourcing requirements, complete the following:

☐ This application does not include any infrastructure projects or activities and therefore **IS NOT** subject the BABAA domestic sourcing requirements.

☐ This application **IS** subject to the BABAA domestic sourcing requirements, because the proposed grant project described in this application includes the following infrastructure projects or activities:

☐ Construction

☐ Remodeling

☐ Broadband Infrastructure

If this application **IS** subject to the BABAA domestic sourcing requirements, please list the page numbers from within the application narrative where the proposed infrastructure project or activities are described:

NOTICE TO ALL APPLICANTS: EQUITY FOR STUDENTS, EDUCATORS, AND OTHER PROGRAM BENEFICIARIES

Section 427 of the General Education Provisions Act (GEPA) ([20 U.S.C. 1228a](#)) applies to applicants for grant awards under this program.

ALL APPLICANTS FOR NEW GRANT AWARDS MUST INCLUDE THE FOLLOWING INFORMATION IN THEIR APPLICATIONS TO ADDRESS THIS PROVISION IN ORDER TO RECEIVE FUNDING UNDER THIS PROGRAM.

Please respond to the following requests for information. Responses are limited to 4,000 characters.

1. Describe how your entity's existing mission, policies, or commitments ensure equitable access to, and equitable participation in, the proposed project or activity.

Education Northwest has a 58-year history of partnering with government agencies and philanthropies on initiatives that are committed to advancing equity in education. We collaborate with communities across the United States to develop and implement evidence-based policies and practices that address the diverse needs of all students. Working with humility, we deploy our expertise in ways that complement the hard work and passion of educators, as well as the social, cultural, and linguistic assets of families, students, and communities. This approach—and these values—will drive the proposed work.

Education Northwest will use a culturally responsive and equitable consultancy approach in our role as lead of the Region 11 Comprehensive Center (R11CC). Our team is driven by a personal and professional commitment to use evidence to help our partners advance equity, solve educational challenges, and improve learning. In our many engagements, we have learned that effective equity and system change efforts need to be authentically co-created with families, educators, and communities, embraced by leadership, adaptable to changing circumstances, and accountable for delivering measurable outcomes. As capacity builders through the Comprehensive Center, we are aware that we must challenge our own biases. We understand that our stakeholders hold multiple viewpoints and that many power dynamics are often in play. We will work closely with our partners, including our SEA partners, advisory board members, and our subcontractors to address these dynamics and ensure the work includes the broadest possible representation, with an emphasis on those most underserved and typically underrepresented.

Throughout this grant cycle, we will use Education Northwest's equity lens and the Equitable Collaboration Framework as we scope work with our partners. Our proposal includes multiple ways stakeholders can voice their perspectives and work collaboratively to implement the necessary systems change and capacity-building work to improve education for students in the R11CC states. Our approach incorporates various strategies to foster inclusivity in project activities. These strategies include regular consultations and feedback mechanisms with stakeholders to ensure their perspectives are integrated into project planning and implementation, adapting our methodologies to reflect the cultural contexts and needs of the communities we serve, implementing a robust performance management and evaluation system to monitor progress and make data-driven adjustments, and providing tailored support to SEAs and local partners to enhance their ability to address educational challenges and advance equity. By leveraging our extensive experience and commitment to equity, Education Northwest is dedicated to ensuring that all project activities are accessible and participatory for the diverse

PR/Award # S283B240076

2. Based on your proposed project or activity, what barriers may impede equitable access and participation of students, educators, or other beneficiaries?

Possible barriers include changes in leadership and/or key SEA program implementers and misalignment or shifts in policy, regulations, and local priorities may all be obstacles to equitable access and participation. In addition, the diversity of contexts across the five-state region we serve can create conditions that can cause challenges for overall implementation and access for all beneficiaries.

3. Based on the barriers identified, what steps will you take to address such barriers to equitable access and participation in the proposed project or activity?

(Step 1) We will engage in regular need sensing and stakeholder engagement as outlined in our proposal to ensure voices from underserved populations are engaged in the work. As part of this, we will establish an advisory board that includes representatives from SEAs, REAs, LEAs, Tribal education agencies, and other relevant stakeholders. The advisory board will provide ongoing guidance, ensure diverse perspectives are included in decision-making, and help align project activities with state and federal policies. This board will meet three times per year to review progress, address challenges, and make recommendations for continuous improvement.

(Step 2) Education Northwest will establish strong relationships with SEA leadership as well as program-level staff members to ensure consistent communication and alignment with evolving policies and priorities and mitigate issues related to turnover.

(Step 3) We will implement flexible and adaptable project plans that can accommodate changes in leadership and shifts in local priorities.

(Step 4) We will foster a culture of trust and transparency to alleviate concerns about accountability and negative feedback, ensuring that evaluation activities are seen as opportunities for growth and improvement rather than punitive measures.

By engaging stakeholders in meaningful ways and addressing their specific needs and concerns, we aim to mitigate these barriers and promote equitable access and participation in all project activities.

4. What is your timeline, including targeted milestones, for addressing these identified barriers?

Step 1: Need sensing, Stakeholder Engagement, Advisory Board. Need sensing includes annual need sensing with the REL, annual listening sessions with stakeholders, capacity building toolset and evaluation, surveys, and site visits. Advisory board meetings will occur three times annually. Need sensing and engagement activities will occur at the start of each project and annually as indicated. Progress will be reported in monthly project logs and documented annually in evaluation reports for all staff and stakeholders to access.

Step 2: Establish Strong Relationships with SEA Leadership. We will meet with SEA leadership and program-level staff to establish communication channels at the launch of the Center. By the beginning of Q2, we will develop and distribute a communication plan to ensure regular updates and alignment. Milestones include completion of the initial meeting and plan, and implementation of plan activities on a regular basis.

Step 3: Implement Flexible and Adaptable Project Plans. Based on activities outlined in the proposal, we will develop adaptable project plans in the first 90 days that include contingency strategies for leadership changes and policy shifts. We will review and finalize project plans with input from advisory board and SEA leadership. Monthly, we will conduct reviews of project plans to incorporate any necessary adjustments.

Step 4: Foster a Culture of Trust and Transparency. We will develop strategies and materials to communicate the purpose and benefits of activities including evaluation activities. We will provide regular feedback sessions and transparent reporting of evaluation results through an annual reflection meeting. Project reports will be available to our SEA clients, and evaluation reports will be made publicly available.

By following this timeline and achieving these milestones, Education Northwest will proactively address potential barriers to equitable access and participation, ensuring that all project activities are inclusive and effective in meeting the diverse needs of our stakeholders.

Notes:

1. Applicants are not required to have mission statements or policies that align with equity in order to submit an application.
2. Applicants may identify any barriers that may impede equitable access and participation in the proposed project or activity, including, but not limited to, barriers based on economic disadvantage, gender, race, ethnicity, color, national origin, disability, age, language, migrant status, rural status, homeless status or housing insecurity, pregnancy, parenting, or caregiving status, and sexual orientation.
3. Applicants may have already included some or all of this required information in the narrative sections of their applications or their State Plans. In responding to this requirement, for each question, applicants may provide a cross-reference to the section(s) and page number(s) in their applications or State Plans that includes the information responsive to that question on this form or may restate that information on this form.

Paperwork Burden Statement

According to the Paperwork Reduction Act of 1995, no persons are required to respond to a collection of information unless such collection displays a valid OMB control number. The valid OMB control number for this information collection is 1894-0005. Public reporting burden for this collection of information is estimated to average 3 hours per response, including time for reviewing instructions, searching existing data sources, gathering, and maintaining the data needed, and completing and reviewing the collection of information. The obligation to respond to this collection is required to obtain or retain a benefit. If you have any comments concerning the accuracy of the time estimate or suggestions for improving this individual collection, send your comments to ICDocketMgr@ed.gov and reference OMB Control Number 1894-0005. All other comments or concerns regarding the status of your individual form may be addressed to either (a) the person listed in the FOR FURTHER INFORMATION CONTACT section in the competition Notice Inviting Applications, or (b) your assigned program officer.

S283B240076

Jennifer Esswein

Education Northwest

1417 NW Everett Street, Suite 310

Portland, OR 97209

S283B240076

Nicky Martin
Education Northwest
1417 NW Everett Street, Suite 310
Portland, OR 97209



**US Department of Education
Washington, D.C. 20202**

S283B240076

GRANT AWARD NOTIFICATION

1	RECIPIENT NAME Education Northwest 1417 NW Everett Street, Suite 310 Portland, OR 97209	2	AWARD INFORMATION <table> <tr> <td>PR/AWARD NUMBER</td><td>S283B240076</td></tr> <tr> <td>ACTION NUMBER</td><td>1</td></tr> <tr> <td>ACTION TYPE</td><td>New</td></tr> <tr> <td>AWARD TYPE</td><td>Discretionary</td></tr> </table>	PR/AWARD NUMBER	S283B240076	ACTION NUMBER	1	ACTION TYPE	New	AWARD TYPE	Discretionary											
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ACTION TYPE	New																					
AWARD TYPE	Discretionary																					
3	PROJECT STAFF RECIPIENT PROJECT DIRECTOR Jennifer Esswein (503) 275-9500 jennifer.esswein@ednw.org EDUCATION PROGRAM CONTACT Elisabeth Lembo (202) 453-5823 elisabeth.lembo@ed.gov EDUCATION PAYMENT HOTLINE G5 PAYEE HELPDESK 888-336-8930 obsseed@servicenowservices.com	4	PROJECT TITLE 84.283B Region 11 Comprehensive Center																			
5	KEY PERSONNEL <table> <thead> <tr> <th><u>NAME</u></th><th><u>TITLE</u></th><th><u>LEVEL OF EFFORT</u></th></tr> </thead> <tbody> <tr> <td>Jennifer Esswein</td><td>Project Director</td><td>57 %</td></tr> <tr> <td>Christine Pitts</td><td>Co- Director</td><td>57 %</td></tr> </tbody> </table>			<u>NAME</u>	<u>TITLE</u>	<u>LEVEL OF EFFORT</u>	Jennifer Esswein	Project Director	57 %	Christine Pitts	Co- Director	57 %										
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ED 001784



GRANT AWARD NOTIFICATION

FUND CODE	FUNDING YEAR	AWARD YEAR	ORG. CODE	CATEGORY	LIMITATION	ACTIVITY	CFDA	OBJECT CLASS	AMOUNT
1000A	2024	2024	ES000000	B	Q2J	000	283	4101C	\$3,057,651.00
10	PR/AWARD NUMBER:			S283B240076					
	RECIPIENT NAME:			Education Northwest					
	GRANTEE NAME:			EDUCATION NORTHWEST					
				1417 NW EVERETT ST, STE 310					
				PORTLAND, OR 97209 - 2653					
	PROGRAM INDIRECT COST TYPE:			Unrestricted					
	PROJECT INDIRECT COST RATE:			33%					
	TERMS AND CONDITIONS								
	(1) THE FOLLOWING ITEMS ARE INCORPORATED IN THE GRANT AGREEMENT:								
	1) THE RECIPIENT'S APPLICATION (BLOCK 2);								
2) THE APPLICABLE EDUCATION DEPARTMENT REGULATIONS: 2 CFR PART 180; NONPROCUREMENT DEBARMENT AND SUSPENSION AS ADOPTED AT 2 CFR PART 3485; 2 CFR PART 200 AS ADOPTED AT 2 CFR 3474 (BLOCK 8), AND 34 CFR PARTS 75, 77, 79, 81, 82, 84, 86, 97, 98, 99; AND THE PROGRAM REGULATIONS SPECIFIED IN BLOCK 8; AND									
3) THE SPECIAL TERMS AND CONDITIONS SHOWN AS ATTACHMENTS IN BLOCK 8 ON THE INITIAL AWARD APPLY UNTIL CHANGED.									
THIS AWARD SUPPORTS ONLY THE BUDGET PERIOD SHOWN IN BLOCK 6. IN ACCORDANCE WITH 34 CFR 75.253, THE SECRETARY CONSIDERS, AMONG OTHER THINGS, CONTINUED FUNDING IF:									
1) CONGRESS HAS APPROPRIATED SUFFICIENT FUNDS UNDER THE PROGRAM;									
2) THE DEPARTMENT DETERMINES THAT CONTINUING THE PROJECT WOULD BE IN THE BEST INTEREST OF THE GOVERNMENT;									
3) THE GRANTEE HAS MADE SUBSTANTIAL PROGRESS TOWARD MEETING THE GOALS AND OBJECTIVES OF THE PROJECT;									
4) THE SECRETARY ESTABLISHED PERFORMANCE MEASUREMENT REQUIREMENTS FOR THE GRANT IN THE APPLICATION NOTICE, THE PERFORMANCE TARGETS IN THE GRANTEE'S APPROVED APPLICATION;									
5) THE RECIPIENT HAS SUBMITTED REPORTS OF PROJECT PERFORMANCE AND BUDGET EXPENDITURES THAT MEET THE REPORTING REQUIREMENTS FOUND AT 34 CFR 75.118, 2 CFR 200.328 AND 200.329, AND ANY OTHER REPORTING REQUIREMENTS ESTABLISHED BY THE SECRETARY; AND									
6) THE GRANTEE HAS MAINTAINED FINANCIAL AND ADMINISTRATIVE MANAGEMENT SYSTEMS THAT MEET THE REQUIREMENTS IN 2 CFR 200.302, FINANCIAL MANAGEMENT, AND 2 CFR 200.303, INTERNAL CONTROLS.									
IN ACCORDANCE WITH 2 CFR 200.308(c)(2) CHANGES TO KEY PERSONNEL IDENTIFIED IN BLOCK 5 MUST RECEIVE PRIOR APPROVAL FROM THE DEPARTMENT.									
THE SECRETARY ANTICIPATES FUTURE FUNDING FOR THIS AWARD ACCORDING TO THE SCHEDULE IDENTIFIED IN BLOCK 6. THESE FIGURES ARE ESTIMATES ONLY AND DO NOT BIND THE SECRETARY TO FUNDING THE AWARD FOR THESE PERIODS OR FOR THE SPECIFIC AMOUNTS SHOWN. THE RECIPIENT WILL BE NOTIFIED OF SPECIFIC FUTURE FUNDING ACTIONS THAT THE SECRETARY TAKES FOR THIS AWARD.									
(2) The Office of Management and Budget requires all Federal agencies to assign a Federal Award Identifying Number (FAIN) to each of their financial assistance awards. The PR/AWARD NUMBER identified in Block 2 is ED 001785 IN.									



**US Department of Education
Washington, D.C. 20202**

GRANT AWARD NOTIFICATION

If subawards are permitted under this grant, and you choose to make subawards, you must document the assigned PR/ AWARD NUMBER (FAIN) identified in Block 2 of this Grant Award Notification on each subaward made under this grant. The term subaward means:

1. A legal instrument to provide support for the performance of any portion of the substantive project or program for which you received this award and that you as the recipient award to an eligible subrecipient. (See 2 CFR 200.331(a))
 2. The term does not include your procurement of property and services needed to carry out the project or program (The payments received for goods or services provided as a contractor are not Federal awards, see 2 CFR 200.501(f) of the OMB Uniform Guidance: "Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards").
 3. A subaward may be provided through any legal agreement, including an agreement that you or a subrecipient considers a contract. (See 2 CFR 200.1)
- (3) Unless this grant solely funds research, you must comply with new regulations regarding awards to faith-based organizations (FBOs) that provide beneficiary services under this grant or under a contract you award to provide beneficiary services under this grant. These new regulations clarify the rights of FBOs and impose certain duties on FBOs regarding the referral of beneficiaries they serve. See 34 CFR 75.52, 75.712-75.714, appendix A to part 75, and 2 CFR 3474.15. The Department has established a web page that provides guidance on the new regulations, including FAQs and other implementation tools, which is available at <http://www2.ed.gov/policy/fund/reg/fbci-reg.html>. If you have any questions about these regulations, please contact the Education Program Contact identified in Block 3 of this GAN.
- (4) In accordance with 34 CFR 75.234(b), this award is classified as a cooperative agreement and will include substantial involvement on the part of the education program contact identified in Block 3. This award is made with the condition that the recipient and the U.S. Department of Education (Department) establish within 60 days of award, and successfully maintain, a cooperative agreement, which delineates the special provisions between the Department and the recipient, signed by both parties.

If you wish to request reconsideration of these specific conditions, please send written notification describing why such conditions should not be imposed on this grant to your Department program officer.

- (5) Reimbursement of indirect costs is subject to the availability of funds and statutory and regulatory restrictions. The negotiated indirect cost rate agreement authorizes a non-Federal entity to draw down indirect costs from the grant awards. The following conditions apply to the below entities.

A. All entities (other than institutions of higher education (IHE))

The GAN for this grant award shows the indirect cost rate that applies on the date of the initial grant for this project. However, after the initial grant date, when a new indirect cost rate agreement is negotiated, the newly approved indirect cost rate supersedes the indirect cost rate shown on the GAN for the initial grant. This new indirect cost rate should be applied according to the period specified in the indirect cost rate agreement, unless expressly limited under EDGAR or program regulations. Any grant award with an approved budget can amend the budget to account for a change in the indirect cost rate. However, for a discretionary grant award any material changes to the budget which may impact the scope or objectives of the grant must be discussed with the program officer at the Department. See 34 CFR 75.560 (d)(3) (ii) (part 75 of EDGAR).

B. Institutions of higher education (IHE)

Under 2 CFR part 200, Appendix III, Indirect (F&A) Costs Identification and Assignment, and Rate Determination for Institutions of Higher Education (IHEs), the Department must apply the negotiated indirect cost rate in effect on the date of the initial grant award to every budget period of the project, including all continuation grants made for this project. See 2 CFR Part 200, Appendix III, paragraph C.7. Therefore, the GAN for each continuation grant will show the original indirect cost rate and it applies to the entire period of performance of this project. If the indirect cost rate agreement that is applicable to this grant does not extend to the end of the grant's project period, the indirect cost rate set at the start of the project period must still be applied to the end of project period regardless of the fact that the rate has otherwise expired.

ED 001786



**US Department of Education
Washington, D.C. 20202**

GRANT AWARD NOTIFICATION

- (6) In accordance with 35 CFR 75.234(b), this award is classified as a cooperative agreement and will include substantial involvement on the part of the education program contact identified in block 3. This award is made with the condition that the recipient and the U.S. Department of Education successfully maintain its current cooperative agreement, which delineates the special provisions between the U.S. Department of Education and the recipient, signed by both parties.

If you wish to request reconsideration of this/these specific condition(s), please send written notification describing why such condition(s) should not be imposed on this grant to your Department program officer.

JEAN MARCHOWSKY Digitally signed by JEAN MARCHOWSKY
Date: 2024.09.26 17:14:33 -04'00'

AUTHORIZING OFFICIAL

DATE

EXPLANATION OF BLOCKS ON THE GRANT AWARD NOTIFICATION

For Discretionary, Formula and Block Grants (See Block 2 of the Notification)

1. RECIPIENT NAME - The legal name of the recipient or name of the primary organizational unit that was identified in the application, state plan or other documents required to be submitted for funding by the grant program.

2. AWARD INFORMATION - Unique items of information that identify this notification.

PR/AWARD NUMBER - A unique, identifying number assigned by the Department to each application. On funded applications, this is commonly known as the "grant number" or "document number." The PR/Award Number is also known as the Federal Award Identifying Number, or FAIN.

ACTION NUMBER - A numeral that represents the cumulative number of steps taken by the Department to date to establish or modify the award through fiscal or administrative means. Action number "01" will always be "NEW AWARD"

ACTION TYPE - The nature of this notification (e.g., NEW AWARD, CONTINUATION, REVISION, ADMINISTRATIVE)

AWARD TYPE - The particular assistance category in which funding for this award is provided, i.e., DISCRETIONARY, FORMULA, or BLOCK. If this award was made under a Research and Development grant program, the terms RESEARCH AND DEVELOPMENT will appear under DISCRETIONARY, FORMULA OR BLOCK.

3. PROJECT STAFF - This block contains the names and telephone numbers of the U.S. Department of Education and recipient staff who are responsible for project direction and oversight.

***RECIPIENT PROJECT DIRECTOR** - The recipient staff person responsible for administering the project. This person represents the recipient to the U.S. Department of Education.

EDUCATION PROGRAM CONTACT - The U.S. Department of Education staff person responsible for the programmatic, administrative and business management concerns of the Department.

EDUCATION PAYMENT CONTACT - The U.S. Department of Education staff person responsible for payments or questions concerning electronic drawdown and financial expenditure reporting.

4. PROJECT TITLE AND CFDA NUMBER - Identifies the Catalog of Federal Domestic Assistance (CFDA) subprogram title and the associated subprogram number.

5.* KEY PERSONNEL - Name, title and percentage (%) of effort the key personnel identified devotes to the project.

6. AWARD PERIODS - Project activities and funding are approved with respect to three different time periods, described below:

BUDGET PERIOD - A specific interval of time for which Federal funds are being provided from a particular fiscal year to fund a recipient's approved activities and budget. The start and end dates of the budget period are shown.

PERFORMANCE PERIOD - The complete length of time the recipient is proposed to be funded to complete approved activities. A performance period may contain one or more budget periods.

***FUTURE BUDGET PERIODS** - The estimated remaining budget periods for multi-year projects and estimated funds the Department proposes it will award the recipient provided substantial progress is made by the recipient in completing approved activities, the Department determines that continuing the project would be in the best interest of the Government, Congress appropriates sufficient funds under the program, and the recipient has submitted a performance report that provides the most current performance information and the status of budget expenditures.

7. AUTHORIZED FUNDING - The dollar figures in this block refer to the Federal funds provided to a recipient during the award periods.

***THIS ACTION** - The amount of funds obligated (added) or de-obligated (subtracted) by this notification.

***BUDGET PERIOD** - The total amount of funds available for use by the grantee during the stated budget period to this date.

***PERFORMANCE PERIOD** - The amount of funds obligated from the start date of the first budget period to this date.

RECIPIENT COST SHARE - The funds, expressed as a percentage, that the recipient is required to contribute to the project, as defined by the program legislation or regulations and/or terms and conditions of the award.

RECIPIENT NON-FEDERAL AMOUNT - The amount of non-federal funds the recipient must contribute to the project as identified in the recipient's application. When non-federal funds are identified by the recipient where a cost share is not a legislation requirement, the recipient will be required to provide the non-federal funds.

8. ADMINISTRATIVE INFORMATION - This information is provided to assist the recipient in completing the approved activities and managing the project in accordance with U.S. Department of Education procedures and regulations.

UEI - The UEI, issued in SAM.gov, is a unique 12 character organization identifier assigned to each recipient for payment purposes.

ED 001788

***REGULATIONS** - Title 2 of the Code of Federal Regulations (CFR), Part 200 as adopted at 2 CFR 3474; the applicable parts of the Education Department General Administrative Regulations (EDGAR), specific program regulations (if any), and other titles of the CFR that govern the award and administration of this grant.

***ATTACHMENTS** - Additional sections of the Grant Award Notification that discuss payment and reporting requirements, explain Department procedures, and add special terms and conditions in addition to those established, and shown as clauses, in Block 10 of the award. Any attachments provided with a notification continue in effect through the project period until modified or rescinded by the Authorizing Official.

9. LEGISLATIVE AND FISCAL DATA - The name of the authorizing legislation for this grant, the CFDA title of the program through which funding is provided, and U.S. Department of Education fiscal information.

FUND CODE, FUNDING YEAR, AWARD YEAR, ORG.CODE, PROJECT CODE, OBJECT CLASS -

The fiscal information recorded by the U.S. Department of Education's Grants Management System (G5) to track obligations by award.

AMOUNT - The amount of funds provided from a particular appropriation and project code. Some notifications authorize more than one amount from separate appropriations and/or project codes. The total of all amounts in this block equals the amount shown on the line, "THIS ACTION" (See "AUTHORIZED FUNDING" above (Block 7)).

10. TERMS AND CONDITIONS - Requirements of the award that are binding on the recipient.

***PARTICIPANT NUMBER** - The number of eligible participants the grantee is required to serve during the budget year.

***GRANTEE NAME** - The entity name and address registered in the System for Award Management (SAM). This name and address is tied to the UEI registered in SAM under the name and address appearing in this field. This name, address and the associated UEI is what is displayed in the SAM Public Search.

***PROGRAM INDIRECT COST TYPE** - The type of indirect cost permitted under the program (i.e. Restricted, Unrestricted, or Training).

***PROJECT INDIRECT COST RATE** - The indirect cost rate applicable to this grant.

***AUTHORIZING OFFICIAL** - The U.S. Department of Education official authorized to award Federal funds to the recipient, establish or change the terms and conditions of the award, and authorize modifications to the award

FOR FORMULA AND BLOCK GRANTS ONLY:

(See also Blocks 1, 2, 4, 6, 8, 9 and 10 above)

3. PROJECT STAFF - The U.S. Department of Education staff persons to be contacted for programmatic and payment questions.

7. AUTHORIZED FUNDING

CURRENT AWARD AMOUNT - The amount of funds that are obligated (added) or de-obligated (subtracted) by this action.

PREVIOUS CUMULATIVE AMOUNT - The total amount of funds awarded under the grant before this action.

CUMULATIVE AMOUNT - The total amount of funds awarded under the grant, this action included.

10. AFFILIATE - If an affiliate digital signature appears on this GAN, it is the digital signature belonging to the individual delegated the authority to affix the Authorizing Official's signature to the GAN.

* This item differs or does not appear on formula and block grants.

UNITED STATES DEPARTMENT OF EDUCATION
OFFICE OF THE CHIEF FINANCIAL OFFICER
& CHIEF INFORMATION OFFICER

Jennifer Esswein
Education Northwest
1417 NW Everett Street, Suite 310

Portland, OR 97209

SUBJECT: Payee Verification for Grant Award S283B240076

This is to inform you of the payee for the above listed grant award issued by the United States Department of Education

Grantee UEI: XJA8AWALTC16
Grantee Name: EDUCATION NORTHWEST

Payee UEI: XJA8AWALTC16
Payee Name: EDUCATION NORTHWEST

If any of the above information is not correct, please contact a Payee Customer Support Representative at 1-888-336-8930. Please send all the correspondence relating to the payee or bank information changes to the following address:

U.S. Department of Education
550 12th Street, SW
Room 6087
Washington, DC 20202

Attn: Stephanie Barnes
Phone: 202-245-8006

SPECIFIC GRANT TERMS AND CONDITIONS FOR FINANCIAL AND PERFORMANCE REPORTS

PERFORMANCE REPORTS:

(1) FINAL REPORTS - ALL RECIPIENTS are required to submit a final performance report within 120 days after the expiration or termination of grant support in accordance with submission instructions provided in box 10 of the Grant Award Notification (GAN), or through another notification provided by the Department of Education (Department) ([2 CFR § 200.329\(c\)](#)).

(2) ANNUAL, QUARTERLY, or SEMIANNUAL REPORTS - ALL RECIPIENTS of a multi-year discretionary award must submit an annual Grant Performance Report ([34 CFR § 75.118](#)). The annual performance report shall provide the most current performance and financial expenditure information that is sufficient to meet the reporting requirements of 2 CFR §§ [200.328](#), [200.329](#), and [34 CFR § 75.720](#).

Your education program contact will provide you with information about your performance report submissions, including the due date, as a grant term or condition in box 10 on the GAN, or through another notification provided by the Department. The grant term or condition in box 10 on the GAN or another notification may reflect any of the following:

1. That a performance report is due before the next budget period begins. The report should contain current performance and financial expenditure information for this grant. It will either identify the date the performance report is due or state that the Department will provide additional information about this report, including due date, at a later time.
2. That an interim performance report is required because of the nature of the award or because of statutory or regulatory provisions governing the program under which this award is made, and that the report is due more frequently than annually as indicated, e.g., due quarterly and submitted within 30 days after the end of each quarter, or due semiannually and submitted within 30 days after the end of each 6-month period ([2 CFR § 200.329\(c\)\(1\)](#)).
3. That other reports are required, e.g., program specific reports required in a program's statute or regulation.

(3) FINANCIAL REPORTS – SOME RECIPIENTS:

If a financial report is required, your education program contact will provide you with information about your financial report submission, including the due date, as a grant term or condition in box 10 on the GAN, or through another notification.

A [Standard Form \(SF\) 425 Federal Financial Report \(FFR\)](#) is required if:

1. A grant involves cost sharing, and the ED 524B, which collects cost sharing information, is not submitted or a program-specific report approved by U.S. Office of Management and Budget (OMB) does not collect cost sharing information;
2. Program income was earned;

3. Indirect cost information is to be reported and the ED 524B was not used or a program-specific report approved by OMB does not collect indirect cost information;
4. Program regulations or statute require the submission of the FFR; or
5. Specific Award Conditions, or specific grant or subgrant conditions for designation of "high risk," were imposed in accordance with 2 C.F.R. part [200.208](#) and part [3474.10](#) and required the submission of the FFR.

If the FFR is required, the notification may indicate one of the following (see the form and its instructions at [Standard Form \(SF\) 425 Federal Financial Report \(FFR\)](#)):

1. Quarterly - FFRs are required for reporting periods ending on 12/31, 03/31, 06/30, 09/30, and are due within 30 days after each reporting period.
2. Semi-annual - FFRs are required for reporting periods ending on 03/31 and 09/30, and are due within 30 days after each reporting period.
3. Annual - FFRs are required for reporting period ending 09/30, and is due within 30 days after the reporting period.
4. Final - In coordination with the submission of final performance reports, FFRs are due within 120 days after the project or grant period end date (2 CFR [200.328](#)).

When completing an FFR for submission, the following must be noted:

1. *Multiple Grant Reporting Using SF 425A Prohibited:* While the FFR is a governmentwide form that is designed for single grant and multiple grant award reporting, the Department's policy is that multiple grant award reporting is not permitted for Department grants. Thus, a Department grantee that is required to submit an FFR in accordance with any of the above referenced selections must complete and submit one FFR for each of its grants. Do not use the FFR attachment (Standard Form 425A), which is available for reporting multiple grants, for reporting on Department grants. As such, references to multiple grant reporting and to the FFR attachment in items 2, 5 and 10 of the FFR are not applicable to Department grantees. With regards to item 1 of the note found in the FFR Instructions, a grantee must complete items 10(a) through 10(o) for each of its grants. The multiple award, multiple grant, and FFR attachment references found in items 2, 5, 6, before 10(a), in item 10(b), before 10(d), before 10(i) and before 10(l) of the Line Item Instructions for the FFR are not applicable to Department grants.
2. *Program Income:* Unless disallowed by statute or regulation, a grantee will complete item 10(m) or 10(n) in accordance with the options or combination of options as provided in 2 CFR Part [200.307](#). A grantee is permitted, in accordance with 2 CFR Part [200.307](#), to add program income to its Federal share to further eligible project or program objectives, use program income to finance the non-Federal share of the project or program; and deduct program income from the Federal share of the total project costs.
3. *Indirect Costs:* A grantee will complete item 11(a) by listing the indirect cost rate type identified on its indirect cost rate agreement, as approved by its cognizant agency for indirect costs.

A Department grantee that does not have an indirect cost rate agreement approved by its cognizant agency for indirect costs, and that is using the Department approved (beyond the 90-day temporary period) temporary indirect cost rate of 10% of budgeted direct salaries and wages, or the de minimis rate of 10% of modified total direct cost (MTDC) must list its indirect cost rate in 11(a) as a Department Temporary Rate or De Minimis Rate. The de minimis rate of 10% of MTDC consists of:

All direct salaries and wages, applicable fringe benefits, materials and supplies, services, travel, and subawards and contracts up to the first \$25,000 of each subaward (i.e., subgrant). MTDC excludes equipment, capital expenditures, charges for patient care, rental costs, tuition remission, scholarships and fellowships, participant support costs and the portion of each subaward in excess of \$25,000. Other items, including contract costs in excess of \$25,000, may be excluded when necessary to avoid a serious inequity in the distribution of indirect costs (see definition of MTDC at [2 CFR § 200.1](#)).

A training program grantee whose recovery of indirect cost limits indirect cost recovery to 8% of MTDC or the grantees negotiated indirect cost rate, whichever is less in accordance with EDGAR § [75.562 \(c\)](#), must list its rate in 11(a) as a Department Training Grant Rate. The 8% limit does not apply to agencies of Indian tribal governments, local governments, and States¹ as defined in [2 CFR § 200.1](#)

A restricted program grantee must list its rate as a Restricted Indirect Cost Rate in 11(a). A restricted program (i.e., programs with statutory supplement-not-supplant requirements) grantee must utilize a restricted indirect cost rate negotiated with its cognizant agency for indirect costs, or may elect to utilize a restricted indirect cost rate of 8% MTDC if their negotiated restricted indirect cost rate calculated under 34 CFR [75.563](#) and [76.564 – 76.569](#), is not less than 8% MTDC. A State or local government² that is a restricted program grantee may not elect to utilize the 8% MTDC rate. Additionally, restricted program grantees may not utilize the de minimis rate, but may utilize the temporary rate until a restricted indirect cost rate is negotiated. If a restricted program grantee elects to utilize the temporary rate, it must list its rate as a Department Temporary Rate in 11(a).

Grantees with indirect cost rates prescribed in program statute or regulation must list their rate as a Rate Required in Program Statute or Regulation in 11(a). Grantees are required to follow program-specific statutory or regulatory requirements that mandate either indirect cost rate type or maximum administrative costs recovery.

For detailed information including restrictions related to temporary, de minimis, training, restricted, and program prescribed indirect cost rates see GAN ATTACHMENT 4.

4. *Supplemental Pages:* If grantees need additional space to report financial information, beyond what is available within the FFR, they should provide supplemental pages. These additional pages must indicate the following information at the top of each page: the PR/Award Number

¹ Note that a State-funded institution of higher education is not considered a “State government” for these purposes; and a Tribal college or university funded by a federally-recognized Tribe is not considered a Tribe for these purposes.

² Note that a State-funded institution of higher education is not considered a “State government” for these purposes.

also known as the Federal Identifying Number or FAIN, recipient organization, Unique Entity Identifier, Employer Identification Number (EIN), and period covered by the report.

AN OVERVIEW OF SINGLE AUDIT REQUIREMENTS OF STATES, LOCAL GOVERNMENTS, AND NONPROFIT ORGANIZATIONS

This GAN ATTACHMENT is **not** applicable to for-profit organizations. For-profit organizations comply with audit requirements specified in block 10 of their Grant Award Notification (GAN).

Summary of Single Audit Requirements for States, Local Governments and Nonprofit Organizations:

1. Single Audit. A non-Federal entity (a State, local government, Indian tribe, Institution of Higher Education (IHE)¹, or nonprofit organization) that expends \$750,000 or more during the non-Federal entity's fiscal year in Federal awards must have a single audit conducted in accordance with 2 CFR 200.501, "Audit Requirements," except when it elects to have a program specific audit conducted.
2. Program-specific audit election. When an auditee expends Federal awards under only one Federal program (excluding research and development (R&D)), and the Federal program's statutes, regulations, or the terms and conditions of the Federal award do not require a financial statement audit of the auditee, the auditee may elect to have a program-specific audit conducted. A program-specific audit may not be elected for R&D unless all of the Federal awards expended were received from the same Federal agency, or the same Federal agency and the same pass-through entity, and that Federal agency, or pass-through entity in the case of a subrecipient, approves in advance a program-specific audit.
3. Exemption when Federal awards expended are less than \$750,000. A non-Federal entity that expends less than \$750,000 during the non-Federal entity's fiscal year in Federal awards is exempt from Federal audit requirements for that year, except as noted in 2 CFR 200.503, but records must be available for review or audit by appropriate officials of the Federal agency, pass-through entity, and Government Accountability Office (GAO). Generally, grant records must be maintained for a period of three years after the date of the final expenditure report ([2 CFR § 200.334](#))
4. Federally Funded Research and Development Centers (FFRDC). Management of an auditee that owns or operates a FFRDC may elect to treat the FFRDC as a separate entity.
5. Report Submission. To meet audit requirements of U.S. Office of Management and Budget (OMB) Uniform Guidance: Cost Principles, Audit, and Administrative Requirements for Federal Awards (Uniform Guidance), grantees must submit all audit documents required by Uniform Guidance 2 CFR 200.512, including Form SF-SAC: Data Collection Form electronically to the Federal Audit Clearinghouse at:

¹ As defined under the Higher Education Act of 1965, as amended (HEA) section 101.

<https://facides.census.gov/Account/Login.aspx>.

The audit must be completed, and the data collection form and reporting package must be submitted within the earlier of 30 calendar days after receipt of the auditor's report(s), or nine months after the end of the audit period. If the due date falls on a Saturday, Sunday, or Federal holiday, the reporting package is due the next business day. Unless restricted by Federal statutes or regulations, the auditee must make copies available for public inspection. Auditees and auditors must ensure that their respective parts of the reporting package do not include protected personally identifiable information. (2 CFR 200.512)

Grantees are strongly urged to obtain the "OMB Compliance Supplement" and to contact their cognizant agency for single audit technical assistance.

The designated cognizant agency for single audit purposes is "the Federal awarding agency that provides the predominant amount of direct funding to the recipient." Grantees should obtain a copy of the OMB Compliance supplement. This supplement will be instructive to both grantees and their auditors. Appendix III of the supplement provides a list of Federal Agency Contacts for Single Audits, including addresses, phone numbers, fax numbers, and e-mail addresses for technical assistance.

For single audit-related questions, if the U.S. Department of Education is the cognizant agency, grantees should contact the Non-Federal Audit Team in the Department's Office of Inspector General, at oignon-federalaudit@ed.gov. Additional resources for single audits are also available on the Non-Federal Audit Team's website at <https://www2.ed.gov/about/offices/list/oig/nonfed/index.html>. For programmatic questions, grantees should contact the education program contact shown on the Department's GAN.

Grantees can obtain information on single audits from:

The OMB website at www.omb.gov. Look under Office of Management and Budget (in right column) then click Office of Federal Financial Management (to obtain OMB Compliance Supplement). The SF-SAC: Data Collection Form can be found at the Federal Audit Clearinghouse at: <https://facides.census.gov/Files/2019-2021%20Checklist%20Instructions%20and%20Form.pdf>.

The American Institute of Certified Public Accountants (AICPA) has illustrative OMB Single Audit report examples that might be of interest to accountants, auditors, or financial staff at www.aicpa.org.

REQUEST FOR APPROVAL OF PROGRAM INCOME

In projects that generate program income, the recipient calculates the amount of program income according to the guidance given in 2 CFR Part 200.307.

***** IF YOU RECEIVED YOUR GRANT AWARD NOTIFICATION ELECTRONICALLY AND YOU ARE SUBJECT TO ANY OF THE RESTRICTIONS IDENTIFIED BELOW, THE RESTRICTION(S) WILL APPEAR IN BOX 10 ON YOUR GRANT AWARD NOTIFICATION AS A GRANT TERM OR CONDITION OF THE AWARD. *****

Unless checked below as NOT ALLOWED, the recipient may exercise any of the options or combination of options, as provided in 2 CFR Part 200.307, for using program income generated in the course of the recipient's authorized project activities:

_____ Not Allowed Adding program income to funds committed to the project by the Secretary and recipient and using it to further eligible project or program objectives;

_____ Not Allowed Using program income to finance the non-Federal share of the project or program; and

_____ Not Allowed Deducting program income from the total allowable cost to determine the net allowable costs.

TRAFFICKING IN PERSONS

The Department of Education adopts the requirements in the Code of Federal Regulations at 2 CFR [175](#) and incorporates those requirements into this grant through this condition. The grant condition specified in 2 CFR [175.15\(b\)](#) is incorporated into this grant with the following changes. Paragraphs a.2.ii.B and b.2. ii. are revised to read as follows:

“a.2.ii.B. Imputed to you or the subrecipient using the standards and due process for imputing the conduct of an individual to an organization that are provided in 34 CFR part 85.”

“b.2. ii. Imputed to the subrecipient using the standards and due process for imputing the conduct of an individual to an organization that are provided in 34 CFR part 85.”

Under this condition, the Secretary may terminate this grant without penalty for any violation of these provisions by the grantee, its employees, or its subrecipients.

**FEDERAL FUNDING ACCOUNTABILITY TRANSPARENCY ACT
REPORTING SUBAWARDS AND EXECUTIVE COMPENSATION**

The Federal Funding Accountability and Transparency Act (FFATA) is designed to increase transparency and improve the public's access to Federal government information. To this end, FFATA requires that Department of Education (Department) grant recipients:

1. Report **first-tier subawards** made under Federal grants that are funded at \$30,000 or more that meet the reporting conditions as set forth in this grant award term;
2. Report their executives' compensation for all new Federal grants that are funded at \$30,000 and that meet the reporting conditions as set forth in this grant award term; and
3. Report executive compensation data for their **first-tier subrecipients** that meet the reporting conditions as set forth in this grant award term.

For FFATA reporting purposes, the Department grant recipient is the entity listed in box 1 of the Grant Award Notification.

Only **first-tier subawards** made by the Department grant recipient to its **first-tier subrecipients** and the **first-tier subrecipients'** executive compensation are required to be reported in accordance with FFATA.

Subaward, Subrecipient, Recipient, Total Compensation, Executives, and other key terms, are defined within item 5, Definitions, of this grant award term.

This grant award term is issued in accordance with [2 CFR Part 170—Reporting Subaward And Executive Compensation Information](#).

1. Reporting of First-tier Subawards -

a. Applicability and what to report.

Unless you are exempt as provided item 4, Exemptions, of this grant award term, you must report each obligation that **equals or exceeds \$30,000** in Federal funds for a first-tier subaward to a non-Federal entity or Federal agency.

You must report the information about each obligating action that are specified in the submission instructions posted at [FSRS](#).

b. Where and when to report.

The Department grant recipient must report each obligating action described in paragraph **1.a.** of this award term to [FSRS](#).

Report subaward information no later than the end of the month following the month in which the subaward obligation was made. For example, if the obligation was made on November 7, 2020, the obligation must be reported by no later than December 31, 2020.

2. Reporting Total Compensation of the Department's Grant Recipients' Executives -

a. *Applicability and what to report.*

You must report total compensation for each of your five most highly compensated executives for the preceding completed fiscal year, if—

- i The total Federal funding authorized to date under this Federal award **equals or exceeds \$30,000;**
- ii In the preceding fiscal year, you received—
 - A. 80 percent or more of your annual gross revenues from Federal procurement contracts (and subcontracts) and Federal financial assistance subject to the Transparency Act, as defined at [2 CFR 170.320](#) (and subawards), **and**
 - B. \$25,000,000 or more in annual gross revenues from Federal procurement contracts (and subcontracts) and Federal financial assistance subject to the Transparency Act, as defined at [2 CFR 170.320](#) (and subawards); **and,**
 - C. The public does not have access to information about the compensation of the executives through periodic reports filed under section 13(a) or 15(d) of the Securities Exchange Act of 1934 (15 U.S.C. 78m(a), 78o(d)) or section 6104 of the Internal Revenue Code of 1986. (To determine if the public has access to the compensation information, see the U.S. Security and Exchange Commission total compensation filings at [SEC Investor.gov Executive Compensation](#).)

b. *Where and when to report.*

You must report executive total compensation described in paragraph **2.a.** of this grant award term:

- i As part of your registration profile at [SAM.gov](#).
- ii By the end of the month following the month in which this award is made (for example, if the obligation was made on November 7, 2020 the executive compensation must be reported by no later than December 31, 2020), and annually thereafter.

3. Reporting of Total Compensation of Subrecipient Executives –

a. *Applicability and what to report.*

Unless you are exempt as provided in item 4, Exemptions, of this award term, for each first-tier **non-Federal entity** subrecipient under this award, you shall report the names and total compensation of each of the subrecipient's five most highly compensated executives for the subrecipient's preceding completed fiscal year, if—

- i In the subrecipient's preceding fiscal year, the subrecipient received—

- A. 80 percent or more of its annual gross revenues from Federal procurement contracts (and subcontracts) and Federal financial assistance subject to the Transparency Act, as defined at [2 CFR 170.320](#) (and subawards), **and**
 - B. \$25,000,000 or more in annual gross revenues from Federal procurement contracts (and subcontracts) and Federal financial assistance subject to the Transparency Act, as defined at [2 CFR 170.320](#) (and subawards); **and**,
 - C. The public does not have access to information about the compensation of the executives through periodic reports filed under section 13(a) or 15(d) of the Securities Exchange Act of 1934 (15 U.S.C. 78m(a), 78o(d)) or section 6104 of the Internal Revenue Code of 1986. (To determine if the public has access to the compensation information, see the U.S. Security and Exchange Commission total compensation filings at [SEC Investor.gov Executive Compensation](#).)
- b. *Where and when to report.*

You must report subrecipient executive total compensation described in paragraph **3.a.** of this grant award term:

- i. In [FSRS](#). You must include a condition on subawards that requires the subrecipients to timely report the information required under paragraph **3.a.** to you the prime awardee, or in the [SAM.gov](#). Subrecipient executive compensation entered in [SAM.gov](#) by the subrecipient will pre-populate in [FSRS](#), so you do not have to report when subrecipients enter this information in [SAM.gov](#). Subrecipient executive compensation not entered in [SAM.gov](#) by the subrecipient is reported in [FSRS](#) by you the Department grant recipient.
- ii. By the end of the month following the month during which you make the subaward. For example, if the subaward obligation was made on November 7, 2020 the subrecipient's executive compensation must be reported by no later than December 31, 2020.

4. Exemptions –

- a. If, in the previous tax year, you had gross income, from all sources, under \$300,000, you are exempt from the requirements to report:
 - i. Subawards, and
 - ii. The total compensation of the five most highly compensated executives of any **subrecipient**.

5. Definitions -

- a. For purposes of this award term:
 - i. Federal *Agency* means a Federal agency as defined at [5 U.S.C. 551\(1\)](#) and further clarified by [5 U.S.C. 552\(f\)](#).
 - ii. Non-Federal *Entity* means all of the following, as defined in [2 CFR part 25](#):

A Governmental organization, which is a State, local government, or Indian tribe;

- A foreign public entity;
- A domestic or foreign nonprofit organization; and,
- A domestic or foreign for-profit organization
- iii. *Executive* means officers, managing partners, or any other employees in management positions.
- iv. *Obligation*, when used in connection with a non-Federal entity's utilization of funds under a Federal award, means orders placed for property and services, contracts and subawards made, and similar transactions during a given period that require payment by the non-Federal entity during the same or a future period.
- v. *Subaward*:

This term means a legal instrument to provide support for the performance of any portion of the substantive project or program for which you received this award and that you as the recipient award to an eligible subrecipient.

The term does not include your procurement of property and services (such as payments to a contractor, small purchase agreements, vendor agreements, and consultant agreements) that are needed for the benefit of the prime awardee to carry out the project or program (for further explanation, see [2 CFR 200.331](#)). For example, the following are not considered subawards:

Cleaning Vendors: Vendors that are hired by a grantee to clean its facility.

Payroll Services Vendors: Vendors that carryout payroll functions for the grantee.

Information Technology Vendors: Vendors that provide IT support to grant staff.

Payments to individuals that are beneficiaries of Federal programs are not considered subawards.

A subaward may be provided through any legal agreement, including an agreement that you or a subrecipient considers a contract.

- v. *Subrecipient* means a non-Federal entity or Federal agency that:

Receives a subaward from you (the recipient) under this award; and

Is accountable to you for the use of the Federal funds provided by the subaward.

In accordance with its subaward, uses the Federal funds to carry out a program for a public purpose specified in authorizing statute, as opposed to providing goods or services for the benefit of the Department prime awardee.

- vii. *Recipient* means a non-Federal entity that receives a Federal award directly from a Federal awarding agency to carry out an activity under a Federal program. The term recipient does not include subrecipients. See also §200.69 Non-Federal entity.
- viii. *Total compensation* means the cash and noncash dollar value earned by the executive during the recipient's or subrecipient's preceding fiscal year and includes the following (for more information see [17 CFR 229.402\(c\)\(2\)](#)):

Salary and bonus.

Awards of stock, stock options, and stock appreciation rights. Use the dollar amount recognized for financial statement reporting purposes with respect to the fiscal year in accordance with the Statement of Financial Accounting Standards No. 123 (Revised 2004) (FAS 123R), Shared Based Payments.

Earnings for services under non-equity incentive plans. This does not include group life, health, hospitalization, or medical reimbursement plans that do not discriminate in favor of executives and are available generally to all salaried employees.

Change in pension value. This is the change in present value of defined benefit and actuarial pension plans.

Above-market earnings on deferred compensation which is not tax-qualified.

Other compensation, if the aggregate value of all such other compensation (e.g., severance, termination payments, value of life insurance paid on behalf of the employee, perquisites, or property) for the executive exceeds \$10,000.

**SPECIFIC CONDITIONS FOR DISCLOSING
FEDERAL FUNDING IN PUBLIC ANNOUNCEMENTS**

When issuing statements, press releases, requests for proposals, bid solicitations and other documents describing projects or programs funded in whole or in part with Federal money, U.S. Department of Education grantees shall clearly state:

- 1) the percentage of the total costs of the program or project which will be financed with Federal money;
- 2) the dollar amount of Federal funds for the project or program; and
- 3) the percentage and dollar amount of the total costs of the project or program that will be financed by non-governmental sources.

Recipients must comply with these conditions under Division H, Title V, Section 505 of Public Law 116-260, Consolidated Appropriations Act, 2021.

**PROHIBITION OF TEXT MESSAGING AND EMAILING WHILE DRIVING
DURING OFFICIAL FEDERAL GRANT BUSINESS**

Federal grant recipients, sub recipients and their grant personnel are prohibited from text messaging while driving a government owned vehicle, or while driving their own privately-owned vehicle during official grant business, or from using government supplied electronic equipment to text message or email when driving.

Recipients must comply with these conditions under Executive Order 13513, "Federal Leadership on Reducing Text Messaging While Driving," October 1, 2009.

**REGISTRATION OF UNIQUE ENTITY IDENTIFIER (UEI) NUMBER AND TAXPAYER
IDENTIFICATION NUMBER (TIN) IN THE SYSTEM FOR AWARD MANAGEMENT (SAM)**

The U.S. Department of Education (Department) Grants Management System (G5) disburses payments via the U.S. Department of Treasury (Treasury). The U.S. Treasury requires that we include your Tax Payer Identification Number (TIN) with each payment. Therefore, in order to do business with the Department you must have a registered Unique Entity Identifier (UEI) and TIN number with the SAM, the U.S. Federal Government's primary registrant database. If the payee UEI number is different than your grantee UEI number, both numbers must be registered in the SAM. Failure to do so will delay the receipt of payments from the Department.

A TIN is an identification number used by the Internal Revenue Service (IRS) in the administration of tax laws. It is issued either by the Social Security Administration (SSA) or by the IRS. A Social Security number (SSN) is issued by the SSA whereas all other TINs are issued by the IRS.

The following are all considered [TINs according to the IRS](#).

- Social Security Number "SSN"
- Employer Identification Number "EIN"
- Individual Taxpayer Identification Number "ITIN"
- Taxpayer Identification Number for Pending U.S. Adoptions "ATIN"
- Preparer Taxpayer Identification Number "PTIN"

If your UEI number is not currently registered with the SAM, you can easily register by going to www.sam.gov. Please allow 3-5 business days to complete the registration process. If you need a new TIN, please allow 2-5 weeks for your TIN to become active. If you need assistance during the registration process, you may contact the SAM Federal Service Desk at 866-606-8220.

If you are currently registered with SAM, you may not have to make any changes. However, please take the time to validate that the TIN associated with your UEI is correct.

If you have any questions or concerns, please contact the G5 Hotline at 888-336-8930.

SYSTEM FOR AWARD MANAGEMENT AND UNIVERSAL IDENTIFIER REQUIREMENTS

1. Requirement for System for Award Management (SAM)

Unless you are exempted from this requirement under 2 CFR 25.110, you are, in accordance with your grant program's Notice Inviting Applications, required to maintain an active SAM registration with current information about your organization, including information on your immediate and highest level owner and subsidiaries, as well as on all predecessors that have been awarded a Federal contract or grant within the last three years, if applicable, at all times during which you have an active Federal award or an application or plan under consideration by a Federal awarding agency. To remain registered in the SAM database after your initial registration, you are required to review and update your information in the SAM database on an annual basis from the date of initial registration or subsequent updates to ensure it is current, accurate and complete.

2. Requirement for Unique Entity Identifier (UEI) Numbers

If you are authorized to make subawards under this award, you:

1. Must notify potential subrecipients that they may not receive a subaward from you unless they provided their UEI number to you.
2. May not make a subaward to a subrecipient when the subrecipient fails to provide its UEI number to you.

3. Definitions

For purposes of this award term:

1. System for Award Management (SAM) means the Federal repository into which a recipient must provide information required for the conduct of business as a recipient. Additional information about registration procedures may be found at the SAM internet site (currently at <https://www.sam.gov>).
2. Unique Entity Identifier (UEI) means the identifier assigned by SAM registration to uniquely identify business entities.
3. Recipient means a non-Federal entity that receives a Federal award directly from a Federal awarding agency to carry out an activity under a Federal program. The term recipient does not include subrecipients. See 2 CFR 200.86.
4. Subaward means an award provided by a pass-through entity to a subrecipient for the subrecipient to carry out part of a Federal award received by the pass-through entity. It does not include payments to a contractor or payments to an individual that is a beneficiary of a Federal program. A subaward may be provided through any form of legal agreement, including an agreement that the pass-through entity considers a contract. See 2 CFR 200.92.

5. Subrecipient means a non-Federal entity that receives a subaward from a pass-through entity to carry out part of a Federal program; but does not include an individual that is a beneficiary of such program. A subrecipient may also be a recipient of other Federal awards directly from a Federal awarding agency. See 2 CFR 200.93.

PARTICIPATION OF FAITH-BASED ORGANIZATIONS

1. A faith-based organization that participates in this program retains its independence from the Government and may continue to carry out its mission consistent with religious freedom and conscience protections in Federal law.
2. A faith-based organization may not use direct Federal financial assistance from the Department to support or engage in any explicitly religious activities except when consistent with the Establishment Clause of the First Amendment and any other applicable requirements. Such an organization also may not, in providing services funded by the Department, or in outreach activities related to such services, discriminate against a program beneficiary or prospective program beneficiary on the basis of religion, a religious belief, a refusal to hold a religious belief, or a refusal to attend or participate in a religious practice.
3. If a grantee under a discretionary grant program of the Department has the authority under the grant to select a private organization to provide services supported by direct Federal financial assistance under the program by subgrant, contract, or other agreement, the grantee must ensure compliance with applicable Federal requirements governing contracts, grants, and other agreements with faith-based organizations, including, as applicable, (Education Department General Administrative Regulations) EDGAR §§ 75.52 and 75.532, Appendices A and B to 34 C.F.R. Part 75, and 2 C.F.R. § 3474.15 (see EDGAR § 75.714).

WRITTEN NOTICE OF BENEFICIARY PROTECTIONS

In accordance with the Education Department General Administrative Regulations (EDGAR), 34 C.F.R. § 75.712, all grantees providing social services under a Department program supported by direct Federal financial assistance (e.g., programs that provide or support employment, independent living, education, or related services to individuals or groups of individuals) must give written notice to a beneficiary or prospective beneficiary of certain protections.

The written notice that an organization uses to notify beneficiaries or prospective beneficiaries of certain religious non-discrimination protections must include language substantially similar to that in [Appendix C to 34 C.F.R. Part 75](#). Grantees have discretion regarding how to provide the notice, which may include providing the notice directly to each beneficiary, posting it on the grantee's website, or other means. A grantee or subgrantee that participates in multiple Department programs may provide a single notice covering all applicable programs. Additionally, grantees must ensure that the notice is accessible to individuals with disabilities and limited English proficient individuals as required by law. **Unless notified by the applicable program office, a grantee is not required to include in the notice the information in paragraph (5) of Appendix C to 34 C.F.R. Part 75 , i.e., the opportunity of a beneficiary to receive information about other similar providers.**

Appendix C to 34 C.F.R. Part 75

Name of Organization:

Name of Program:

Contact Information for Program Staff: [provide name, phone number, and email address, if appropriate]

Because this program is supported in whole or in part by financial assistance from the U.S. Department of Education, we are required to provide you the following information:

- (1) We may not discriminate against you on the basis of religion, a religious belief, a refusal to hold a religious belief, or a refusal to attend or participate in a religious practice.
- (2) We may not require you to attend or participate in any explicitly religious activities (including activities that involve overt religious content such as worship, religious instruction, or proselytization) that may be offered by our organization, and any participation by you in such activities must be purely voluntary.
- (3) We must separate in time or location any privately funded explicitly religious activities (including activities that involve overt religious content such as worship, religious instruction, or proselytization) from activities supported with direct Federal financial assistance.
- (4) You may report violations of these protection, including any denials of services or benefits by an organization, by filing a written complaint with the U.S. Department of Education at BeneficiaryNoticeComplaints@ed.gov.

[When required by the Department, the notice must also state:] (5) If you would like information about whether there are any other federally funded organizations that provide the services available under this program in your area, please contact the awarding agency.

This written notice must be given to you before you enroll in the program or receive services from the program, unless the nature of the service provided, or exigent circumstances make it impracticable to provide such notice before we provide the actual service. In such an instance, this notice must be given to you at the earliest available opportunity.

**ATTACHMENT B
SPECIAL GRANT TERMS AND CONDITIONS FOR
FINANCIAL AND PERFORMANCE REPORTS**

PERFORMANCE REPORTS:

ALL RECIPIENTS are required to submit a final performance report within 90 days after the expiration or termination of grant support.

ALL RECIPIENTS of a multi-year discretionary award must submit an annual Grant Performance Report. The report should contain current performance and financial expenditure information for this grant. (34 CFR 75.118)

***** IF YOU HAVE RECEIVED YOUR GRANT AWARD NOTIFICATION ELECTRONICALLY, THE ITEMS BELOW WILL NOT BE CHECKED. YOUR EDUCATION PROGRAM CONTACT WILL PROVIDE YOU WITH INFORMATION ABOUT YOUR PERFORMANCE REPORT SUBMISSIONS, INCLUDING THE DUE DATE, AS A GRANT TERM OR CONDITION IN BOX 10 ON THE GRANT AWARD NOTIFICATION, OR THROUGH ANOTHER NOTIFICATION AT A LATER TIME. *****

Refer to the item(s) checked below for other reporting requirements that may apply to this grant:

_____ 1. A performance report is due before the next budget period begins. The report should contain current performance and financial expenditure information for this grant. (34 CFR 75.118)

_____ The continuation report is due on _____.

_____ The Department will provide recipients with additional information about this report, including due date, at a later time.

_____ 2. An interim performance report is required because of the nature of this award or because of statutory or regulatory provisions governing the program under which this award is made. The report is due more frequently than annually as indicated:

_____ Quarterly Submit within 30 days after the end of each quarter.

_____ Semiannually Submit within 30 days after the end of each 6-month period.

_____ 3. Other Required Reports:

***** IF YOU HAVE RECEIVED YOUR GRANT AWARD NOTIFICATION ELECTRONICALLY, THE ITEMS BELOW WILL NOT BE CHECKED. IF A FINANCIAL REPORT IS REQUIRED, YOUR EDUCATION PROGRAM CONTACT WILL PROVIDE YOU WITH INFORMATION ABOUT YOUR FINANCIAL REPORT SUBMISSION, INCLUDING THE DUE DATE, AS A GRANT TERM OR CONDITION IN BOX 10 ON THE GRANT AWARD NOTIFICATION, OR THROUGH ANOTHER NOTIFICATION AT A LATER TIME. *****

FINANCIAL REPORTS:

Unless an item down below is checked, a Standard Form 425 Federal Financial Report (FFR) is not required for this grant. The Department will rely on the drawdown of funds by grant award and record such drawdowns as expenditures by grantees. (34 CFR 75.720)

_____ Quarterly FFRs are required for reporting periods ending on 12/31, 03/31, 06/30, 09/30, and are due within 45 days after each reporting period.

_____Semi-annual FFRs are required for reporting periods ending on 03/31 and 09/30, and are due within 45 days after each reporting period.

_____An annual FFR is required for reporting period ending 09/30, and is due within 45 days after the reporting period.

_____A final FFR is due within 90 days after the project or grant period end date.

A quarterly, semi-annual, annual, and/or final FFR as noted hereinabove is due for this grant because:

_____ (34 CFR 74.14 or 80.12) Special Award Conditions or Special grant or subgrant conditions for "high-risk" grantees:

_____ Statutory Requirement or Other Special Condition

When completing an FFR for submission in accordance with the above referenced selection, the following must be noted:

1. While the FFR is a government wide form that is designed for single grant and multiple grant award reporting, the U.S. Department of Education's (EDs) policy is that multiple grant award reporting is not permitted for ED grants. Thus, an ED grantee that is required to submit an FFR in accordance with any of the above referenced selections must complete and submit one FFR for each of its grants. The FFR attachment (Standard Form 425A), which is available for reporting multiple grants, is not to be used for ED grants. As such, references to multiple grant reporting and to the FFR attachment in items 2, 5 and 10 of the FFR are not applicable to ED grantees. With regards to item 1 of the note found in the Federal Financial Report Instructions, it is EDs policy that a grantee must complete items 10(a) through 10(o) for each of its grants. The multiple award, multiple grant, and FFR attachment references found in items 2, 5, 6, before 10(a), in item 10(b), before 10(d), before 10(i) and before 10(l) of the Line Item Instructions for the Federal Financial Report are not applicable to ED grants.
2. Unless disallowed by statute or regulation, a grantee will complete item 10(m) or 10(n) in accordance with the options or combination of options as provided in 34 CFR 74.24(a)-(h) and 34 CFR 80.25(a)-(h). A grantee is permitted, in accordance with 34 CFR 74.24(a)-(h) and 34 CFR 80.25(a)-(h), to add program income to its Federal share to further eligible project or program objectives, use program income to finance the non-Federal share of the project or program; and deduct program income from the Federal share of the total project costs.
3. A grantee will complete item 11(a) by listing the rate type identified in its indirect cost rate agreement, as approved by its cognizant agency. An ED grantee that does not have an indirect cost rate agreement approved by its cognizant agency, and that is using the ED approved temporary rate of 10% of budgeted direct salaries and wages, must list its rate in 11(a) as an ED Temporary Rate. A training program grantee whose recovery of indirect cost is limited to 8% of a modified total direct cost base in accordance with EDGAR § 75.562 (c), must list its rate as an ED Training Grant Rate. A restricted rate program grantee (such as one with a supplement-not-supplant grant provision) that has not negotiated an indirect cost agreement with its cognizant agency and that has limited the recovery of indirect costs in accordance with 34 CFR 75.563 and 76.564 (c), must list its rate as an ED Restricted Rate.
4. Quarterly, semi-annual, and annual interim reports shall be due within 45 days after the end of the reporting period. Although the Office of Management and Budget (OMB) published in its December 7, 2007 Federal Register Notice (72 FR 69236) that interim reports are due within 45 days of the interim reporting end dates instead of within 30 days as originally identified, OMB has not revised the FFR instructions to reflect this change. Grantees are, nevertheless, permitted to exercise the 45 day period as published by OMB

within the Federal Register. Final reports shall be due no later than 90 days after the project or grant period end date. Extensions of reporting due dates may be approved by the program office upon request by the grantee.

5. If grantees need additional space to report financial information, beyond what is available within the FFR, they should provide supplemental pages. These additional pages must indicate the following information at the top of each page: Federal Grant or other identifying number, recipient organization, Data Universal Number System (DUNS) number, Employer Identification Number (EIN), and period covered by the report.

One original and one copy of all reports should be mailed to:

U.S. Department of Education
Executive Director
Office of Elementary and Secondary Education
400 Maryland Avenue, SW, FB6, Room 3W342
Washington, DC 20202-6100

12/2012

ED 001813

KEY FINANCIAL MANAGEMENT REQUIREMENTS FOR DISCRETIONARY GRANTS AWARDED BY THE DEPARTMENT OF EDUCATION

The Department expects grantees to administer Department grants in accordance with generally accepted business practices, exercising prudent judgment so as to maintain proper stewardship of taxpayer dollars. This includes using fiscal control and fund accounting procedures that insure proper disbursement of and accounting for Federal funds. In addition, grantees may use grant funds only for obligations incurred during the funding period.

Title 2 of the Code of Federal Regulations Part 200, "Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards," establishes requirements for Federal awards made to non-Federal entities. The Education Department General Administrative Regulations in 34 CFR (EDGAR) 75, 76, 77, 79, 81, 82, 84, 86, 97, 98, and 99 contain additional requirements for administering discretionary grants made by this Department. The most recent version of these regulations may be accessed at the following URLs:

[The Education Department General Administrative Regulations \(EDGAR\)](#)

[2 CFR Part 200 Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards](#)

The information on page 2, "Selected Topics in Administering Department Discretionary Grants," highlights major administrative requirements of 2 CFR Part 200. In addition, a few of the topics discuss requirements that the Department imposes on its discretionary grantees under EDGAR, Part 75 (Direct Grants). The specific sections of 2 CFR Part 200 and of EDGAR that address the topics discussed are shown in parentheses. The Department urges grantees to read the full text of these and other topics in EDGAR and in 2 CFR Part 200.

Grantees are reminded that a particular grant might be subject to additional requirements of the authorizing statute for the program that awarded the grant and/or any regulations issued by the program office. Grantees should become familiar with those requirements as well, because program-specific requirements might differ from those in 2 CFR Part 200 and in EDGAR.

The Department recommends that the project director and the fiscal management staff of a grantee organization communicate frequently with each other about the grant budget. Doing so will help to assure that you use Federal funds only for those expenditures associated with activities that conform to the goals and objectives approved for the project.

Grantees may direct any questions regarding the topics discussed on page 2, "Selected Topics in Administering Department Discretionary Grants," or about any other aspect of administering your grant award to the Department program staff person named in Block 3 of the Grant Award Notification.

SELECTED TOPICS IN ADMINISTERING DEPARTMENT DISCRETIONARY GRANTS**I. Financial Management Systems (2 CFR Part 200.302)**

In general, grantees are required to have financial management systems that:

- * provide for accurate, current, and complete disclosure of results regarding the use of funds under grant projects;
- * provide adequate source documentation for Federal and non-Federal funds used under grant projects;
- * contain procedures to determine the allowability, allocability, and reasonableness of obligations and expenditures made by the grantee; and
- * enable the grantee to maintain effective internal control and fund accountability procedures, e.g., requiring separation of functions so that the person who makes obligations for the grantee is not the same person who signs the checks to disburse the funds for those obligations.

State systems must account for funds in accordance with State laws and procedures that apply to the expenditure of and the accounting for a State's own funds. A State's procedures, as well as those of its subrecipients and cost-type contractors, must be sufficient to permit the preparation of reports that may be required under the award as well as provide the tracing of expenditures to a level adequate to establish that award funds have not been used in violation of any applicable statutory restrictions or prohibitions.

II. Federal Payment (2 CFR Part 200.305)

Under this part --

- * the Department pays grantees in advance of their expenditures if the grantee demonstrates a willingness and ability to minimize the time between the transfer of funds to the grantee and the disbursement of the funds by the grantee;
- * grantees repay to the Federal government interest earned on advances; and
- * grantees, generally, must maintain advance payments of Federal awards in interest bearing accounts.

In general, grantees should make payment requests frequently, only for small amounts sufficient to meet the cash needs of the immediate future.

The Department has recently encountered situations where grantees failed to request funds until long after the grantee actually expended its own funds for the costs of its grant. Grantees need to be aware that, by law, Federal funds are available for grantees to draw down for only a limited period of time, after which the funds revert to the U.S. Treasury. In some cases grantees have requested funds too late for the Department to be able to pay the grantees for legitimate costs incurred during their project periods.

The Department urges financial managers to regularly monitor requests for payment under their grants to assure that Federal funds are drawn from the Department G5 Payment System at the time those funds are needed for payments to vendors and employees.

III. Personnel (EDGAR §§ 75.511-75.519 and 2 CFR Part 200 Subpart D and E)

The rules governing personnel costs are located in EDGAR Part 75 and 2 CFR Part 200 Subparts D and E. Part 75 covers issues such as paying consultants with grant funds, prohibiting dual compensation of staff, and waiving the requirement for a full-time project director. The rules clarifying changes in key project staff are located in 2 CFR Part 200.308 (c)(2). General rules governing reimbursement of salaries and compensation for staff working on grant projects are addressed in the cost principles in 2 CFR Part 200 Subpart D and E. In all cases, payments of any type to personnel must be supported by complete and accurate records of employee time and effort. For those employees that work on multiple functions or separately funded programs or projects, the grantee must also maintain time distribution records to support the allocation of employee salaries among each function and separately funded program or project.

IV. Cost Principles (2 CFR Part 200 Subpart E)

All costs incurred under any grant are subject to the cost principles found in 2 CFR Part 200 Subpart E. The cost principles provide lists of selected items of allowable and unallowable costs, and must be used in determining the allowable costs of work performed under the grant.

V. Procurement Standards (2 CFR Part 200.317-327)

Under 2 CFR Part 200.317, States are required to follow the procurement rules the States have established for purchases funded by non-Federal sources. When procuring goods and services for a grant's purposes, all other grantees may follow their own procurement procedures, but only to the extent that those procedures meet the minimum requirements for procurement specified in the regulations. These requirements include written competition procedures and codes of conduct for grantee staff, as well as requirements for cost and price analysis, record-keeping and contractor compliance with certain Federal laws and regulations. These regulations also require grantees to include certain conditions in contracts and subcontracts, as mandated by the regulations and statutes.

VI. Indirect Costs (EDGAR §§75.560-564 and 2 CFR Part 200.414)

In addition to the information presented below, see GAN ATTACHMENT 4 for additional information including restrictions related to temporary, de minimis, training, restricted, and program prescribed indirect cost rates.

A. Unrestricted Indirect Cost Rate

To utilize an unrestricted indirect cost rate, a grantee must have an indirect cost agreement with its cognizant agency, submit an indirect cost rate proposal to its cognizant agency for indirect

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costs (cognizant agency) within 90 days after the award of this grant or elect to utilize the de minimis rate under 2 CFR § 200.414(f) or the temporary indirect cost rate (subject to limitations described below).

The grantee must provide proof of its negotiated indirect cost rate agreement to the Department as soon as it has signed such an agreement with its cognizant agency.

B. Temporary Indirect Cost Rate

A grantee that does not have a current negotiated indirect cost rate agreement may recover indirect costs at a temporary rate, which is limited to 10% of budgeted direct salaries and wages (See 34 CFR § 75.560(c)); or it may choose not to charge indirect costs to the grant. The temporary rate can only be used for 90 days unless the exceptional circumstances apply under 34 CFR § 75.560(d)(2).

If the grantee has not submitted its indirect cost proposal to its cognizant agency within the 90-day period, it may no longer recover indirect costs utilizing the temporary indirect cost rate until it has negotiated an indirect cost rate agreement with its cognizant agency. Once a grantee obtains a federally recognized indirect cost rate that is applicable to this grant, the grantee may use that indirect cost rate to claim indirect cost reimbursement.

C. De minimis Indirect Cost Rate

Institutions of Higher Education (IHEs), federally-recognized Indian Tribes, State and Local Governments¹ receiving less than \$35 million in direct federal funding, and nonprofit organizations, if they do not have a current negotiated (including provisional) rate, and are not subject to the Department's training rate or restricted rate (supplement-not-supplant provisions) may elect to charge a de minimis indirect cost rate of 10% of modified total direct costs (MTDC). This rate may be used indefinitely.

MTDC consists of all direct salaries and wages, applicable fringe benefits, materials and supplies, services, travel, and subawards and contracts up to the first \$25,000 of each subaward (i.e., subgrant). MTDC excludes equipment, capital expenditures, charges for patient care, rental costs, tuition remission, scholarships and fellowships, participant support costs and the portion of each subaward in excess of \$25,000. Other items, including contract costs in excess of \$25,000, may be excluded when necessary to avoid a serious inequity in the distribution of indirect costs (see definition of MTDC at 2 CFR § 200.1).

Additionally, the de minimis rate may not be used by grantees that are subject to the Department's training indirect cost rate (34 CFR § 75.562) or restricted indirect cost rate. The de minimis rate may be used indefinitely. However, if a grantee chooses to use the de minimis rate to recover indirect costs, it must do so for all of its Federal awards until such time as the grantee negotiates an indirect cost rate with its cognizant agency. Once a grantee obtains a federally recognized indirect cost rate that is applicable to this grant, the grantee may use that indirect cost rate to claim indirect cost reimbursement.

¹ Note that a State-funded institution of higher education is not considered a "State government" for these purposes.

D. Programs with a Supplement-not-supplant requirement (restricted indirect cost rate)

A restricted program (i.e., programs with statutory supplement-not-supplant requirements) grantee must utilize a restricted indirect cost rate negotiated with its cognizant agency for indirect costs, or may elect to utilize a restricted indirect cost rate of 8% MTDC if their negotiated restricted indirect cost rate calculated under 34 CFR 75.563 and 76.564 – 76.569, is not less than 8% MTDC. A State or local government² that is a restricted program grantee may not elect to utilize the 8% MTDC rate. Additionally, restricted program grantees may not utilize the de minimis rate, but may utilize the temporary rate until a restricted indirect cost rate is negotiated.

E. Training Grant Indirect Cost Rate

If the grantee is a training grant recipient and is not a State, local, or Tribal government³, the grantee must negotiate a rate under 34 CFR 75.562. This provision limits indirect cost recovery to 8% of modified total direct costs or the grantees negotiated indirect cost rate, whichever is less.

The recovery using the training grant indirect cost rate is subject to the following limitations:

- i. The lesser of the 8% indirect cost rate or negotiated indirect cost rate also applies to sub-awards that fund training.
- ii. The 8% limit does not apply to agencies of Indian tribal governments, local governments, and States as defined in 2 CFR § 200.1, respectively.
- iii. Indirect costs in excess of the 8% limit may not be charged directly, used to satisfy matching or cost-sharing requirements, or charged to another Federal award.
- iv. A grantee using the training rate of 8% is required to have documentation available for audit that shows that its negotiated indirect cost rate is at least 8%.

F. Program-Specific Indirect Cost Rate

Grantees are required to follow program-specific statutory or regulatory requirements that mandate either indirect cost rate type or maximum administrative costs recovery instead of the general requirements described here.

VII. Audit Requirements (2 CFR Part 200 Subpart F)

2 CFR 200 Subpart F requires that grantees that are non-Federal entities (a State, local government, Indian tribe, IHE, or nonprofit organization that carries out a Federal award as a recipient or subrecipient) obtain a non-Federal audit of their expenditures under their Federal grants if the grantee expends more than \$750,000 in Federal funds in one fiscal year. 2 CFR Part 200 Subpart F contains the requirements imposed on grantees for

² Note that a State-funded institution of higher education is not considered a “State government” for these purposes.

³ Note that a State-funded institution of higher education is not considered a “State government” for these purposes; and a Tribal college or university funded by a federally-recognized Tribe is not considered a Tribe for these purposes.

audits done in connection with the law.

The Department recommends hiring auditors who have specific experience in auditing Federal awards under the regulations and the Compliance Supplement.

VIII. Other Considerations

Some other topics of financial management covered in 2 CFR Part 200 that might affect particular grants include program income (2 CFR Part 200.307), cost sharing or matching (2 CFR Part 200.306), property management requirements for equipment and other capital expenditures (2 CFR Parts 200.313, 200.439).

MEMORANDUM TO ED DISCRETIONARY GRANTEES

You are receiving this memorandum to remind you of Federal requirements, found in 2 CFR Part [200](#), *Uniform Administrative Requirements, Cost Principles, and Audit Requirements*, regarding cash drawdowns under your grant account.

For any cash that you draw from your Department of Education (*the Department*) grant account, you must:

- draw down only as much cash as is necessary to meet the immediate needs of the grant project;
- keep to the minimum the time between drawing down the funds and paying them out for grant activities; and
- return to the Government the interest earned on grant funds deposited in interest-bearing bank accounts except for a small amount of interest earned each year that your entity is allowed to keep to reimburse itself for administrative expenses).

In order to meet these requirements, you are urged to:

- take into account the need to coordinate the timing of drawdowns with prior internal clearances (e.g., by boards, directors, or other officials) when projecting immediate cash needs so that funds drawn down from ED do not stay in a bank account for extended periods of time while waiting for approval;
- monitor the fiscal activity (drawdowns and payments) under your grant on a continuous basis;
- plan carefully for cash flow in your grant project during the budget period and review project cash requirements before each drawdown; and
- pay out grant funds for project activities as soon as it is practical to do so after receiving cash from the Department.

Keep in mind that the Department monitors cash drawdown activity for all grants. Department staff will contact grantees who appear to have drawn down excessive amounts of cash under one or more grants during the fiscal quarter to discuss the particular situation. For the purposes of drawdown monitoring, the Department will contact grantees who have drawn down 50% or more of the grant in the first quarter, 80% or more in the second quarter, and/or 100% of the cash in the third quarter of the budget period. However, even amounts less than these thresholds could still represent excessive drawdowns for your particular grant activities in any particular quarter. Grantees determined to have drawn down excessive cash will be required to return the excess funds to the Department, along with any associated earned interest, until such time as the money is legitimately needed to pay for grant activities. If you need assistance with returning funds and interest, please contact the Department's G5 Hotline by calling 1-888-336-8930.

Grantees that do not follow Federal cash management requirements and/or consistently appear on the Department's reports of excessive drawdowns could be:

- subjected to specific award conditions or designated as a "high-risk" grantee [2 CFR Part [200.208](#) and 2 CFR [3474.10](#)], which could mean being placed on a "cash-reimbursement" payment method (i.e., a grantee would experience the inconvenience of having to pay for grant activities with its own money and waiting to be reimbursed by the Department afterwards);

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- subject to further corrective action;
- denied selection for funding on future ED grant applications [EDGAR [75.217\(d\)\(3\)\(ii\)](#)]; and/or
- debarred or suspended from receiving future Federal awards from any executive agency of the Federal government.

You are urged to read 2 CFR Part 200.[305](#) to learn more about Federal requirements related to grant payments and to determine how to apply these requirements to any subgrantees. You are urged to make copies of this memorandum and share it with all affected individuals within your organization.

THE USE OF GRANT FUNDS FOR CONFERENCES AND MEETINGS

You are receiving this memorandum to remind you that grantees must take into account the following factors when considering the use of grant funds for conferences and meetings:

- Before deciding to use grant funds to attend or host a meeting or conference, a grantee should:
 - Ensure that attending or hosting a conference or meeting is consistent with its approved application and is reasonable and necessary to achieve the goals and objectives of the grant;
 - Ensure that the primary purpose of the meeting or conference is to disseminate technical information, (e.g., provide information on specific programmatic requirements, best practices in a particular field, or theoretical, empirical, or methodological advances made in a particular field; conduct training or professional development; plan/coordinate the work being done under the grant); and
 - Consider whether there are more effective or efficient alternatives that can accomplish the desired results at a lower cost, for example, using webinars or video conferencing.
- Grantees must follow all applicable statutory and regulatory requirements in determining whether costs are reasonable and necessary, especially the Cost Principles for Federal grants set out at 2 CFR Part 200 Subpart E of the, "Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards." In particular, remember that:
 - Federal grant funds cannot be used to pay for alcoholic beverages; and
 - Federal grant funds cannot be used to pay for entertainment, which includes costs for amusement, diversion, and social activities.
- Grant funds may be used to pay for the costs of attending a conference. Specifically, Federal grant funds may be used to pay for conference fees and travel expenses (transportation, per diem, and lodging) of grantee employees, consultants, or experts to attend a conference or meeting if those expenses are reasonable and necessary to achieve the purposes of the grant.
 - When planning to use grant funds for attending a meeting or conference, grantees should consider how many people should attend the meeting or conference on their behalf. The number of attendees should be reasonable and necessary to accomplish the goals and objectives of the grant.
- A grantee hosting a meeting or conference may not use grant funds to pay for food for conference attendees unless doing so is necessary to accomplish legitimate meeting or conference business.
 - A working lunch is an example of a cost for food that might be allowable under a Federal grant if attendance at the lunch is needed to ensure the full participation by conference attendees in essential discussions and speeches concerning the purpose of the conference and to achieve the goals and objectives of the project.
- A meeting or conference hosted by a grantee and charged to a Department grant must not be promoted as a U.S. Department of Education conference. This means that the seal of the U.S. Department of Education must not be used on conference materials or signage without Department approval.

- All meeting or conference materials paid for with grant funds must include appropriate disclaimers, such as the following:

The contents of this (insert type of publication; e.g., book, report, film) were developed under a grant from the Department of Education. However, those contents do not necessarily represent the policy of the Department of Education, and you should not assume endorsement by the Federal Government.
- Grantees are strongly encouraged to contact their project officer with any questions or concerns about whether using grant funds for a meeting or conference is allowable prior to committing grant funds for such purposes.
 - A short conversation could help avoid a costly and embarrassing mistake.
- Grantees are responsible for the proper use of their grant awards and may have to repay funds to the Department if they violate the rules on the use of grant funds, including the rules for meeting- and conference-related expenses.

MEMORANDUM TO REMIND DEPARTMENT OF EDUCATION GRANTEES OF EXISTING CASH MANAGEMENT REQUIREMENTS CONCERNING PAYMENTS

The Department of Education (Department) requires that its grantees adhere to existing cash management requirements concerning payments and will ensure that their subgrantees are also aware of these policies by providing them relevant information. A grantee's failure to comply with cash management requirements may result in an improper payment determination by the Department in accordance with the [Payment Integrity Information Act \(PIIA\) of 2019](#).

There are three categories of payment requirements that apply to the drawdown of funds from grant accounts at the Department. The first two types of payments are subject to the requirements in the Treasury Department regulations implementing the Cash Management Improvement Act (CMIA) of 1990, 31 U.S.C. 6513, and the third is subject to the requirements in the *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards* (Uniform Guidance) at 2 CFR part 200,¹ as follows:

1. Payments to a State under programs that are covered by a State's Treasury State Agreement (TSA);
2. Payments to States under programs that are not covered by a TSA; and
3. Payments to other non-Federal entities, including nonprofit organizations and local governments.

CMIA Requirements Applicable to Programs included in a TSA

Generally, under the Treasury Department regulations implementing the CMIA, only major assistance programs (large-dollar programs meeting thresholds in 31 CFR § 205.5) are included in a State's written TSA. See 31 CFR § 205, subpart A. Programs included in a TSA must use approved funding techniques and both States and the Federal government are subject to interest liabilities for late payments. State interest liabilities accrue from the day federal funds are credited to a State account to the day the State pays out the federal funds for federal assistance program purposes. 31 CFR § 205.15. If a State makes a payment under a Federal assistance program before funds for that payment have been transferred to the State, Federal Government interest liabilities accrue from the date of the State payment until the Federal funds for that payment have been deposited to the State account. 31 CFR § 205.14.

CMIA Requirements Applicable to Programs Not Included in a TSA

Payments to States under programs not covered by a State's TSA are subject to subpart B of Treasury's regulations in 31 CFR § 205. These regulations provide that a State must minimize the time between the drawdown of funds from the federal government and their disbursement for approved program activities. The timing and amount of funds transfers must be kept to a minimum and be as close as is administratively feasible to a State's actual cash outlay for direct program costs and the proportionate share of any allowable indirect costs. 31 CFR § 205.33(a). States should exercise sound cash management in funds transfers to subgrantees.

¹ The Department adopted the Uniform Guidance as regulations of the Department at 2 CFR part 3474.

Under subpart B, neither the States nor the Department owe interest to the other for late payments. 31 CFR § 205.33(b). However, if a State or a Federal agency is consistently late in making payments, Treasury can require the program to be included in the State's TSA. 31 CFR § 205.35.

Fund transfer requirements for grantees other than State governments and subgrantees

The transfer of Federal program funds to grantees other than States and to subgrantees are subject to the payment and interest accrual requirements in the Uniform Guidance at 2 CFR § 200.305(b). These requirements are like those in subpart B of the Treasury Department regulations in 31 CFR part 205, requiring that "payments methods must minimize the time elapsing between the transfer of funds from the United States Treasury or the pass-through entity and the disbursement by the non-Federal entity." 2 CFR § 200.305(b) introduction.

The Federal Government and pass-through entities must make payments in advance of expenditures by grantees and subgrantees if these non-Federal entities maintain, or demonstrate the willingness to maintain, written procedures "that minimize the time elapsing between the transfer of funds and disbursement by the non-Federal entity, and financial management systems that meet the standards for fund control and accountability." 2 CFR § 200.305(b)(1). If a grantee or subgrantee cannot meet the criteria for advance payments, a Federal agency or pass-through entity can pay that entity through reimbursement. See 2 CFR § 200.305(b)(1) and (4) for more detailed description of the payment requirements and the standards for requiring that payments be made by reimbursement.

Non-Federal entities must maintain advance payments in interest bearing accounts unless certain conditions exist. See 2 CFR § 200.305(b)(8) for those conditions. The requirements regarding interest accrual and remittance follow:

Grantees and subgrantees must annually remit interest earned on federal advance payments except that interest earned amounts up to \$500 per year may be retained for administrative expense. Any additional interest earned on Federal advance payments deposited in interest-bearing accounts must be remitted annually to the Department of Health and Human Services Payment Management System (PMS) through an electronic medium using either Automated Clearing House (ACH) network or a Fedwire Funds Service payment. 2 CFR § 200.305(b)(9)(i) and (ii).

1. When returning interest through ACH Direct Deposit or Fedwire, grantees must include the following in their return transaction:
 - PMS Account Number (PAN). NOTE: The PAN is the same series of alpha-numeric characters used for payment request purposes (e.g.: C1234G1).
 - PMS document number.
 - The reason for the return (e.g., interest, part interest part other, etc.).
 - An explanation stating that the refund is for interest payable to the Department of Health and Human Services, and the grant number(s) for which the interest was earned.
- a. U.S. Department of Education grantees are generally located and operate domestically and return interest domestically. Below is PSC ACH account information for interest returned

domestically. For international ACH interest returned, account information is available at: Returning Funds/Interest.

- PSC ACH Routing Number is: 051036706
 - PSC DFI Accounting Number: 303000
 - Bank Name: Credit Gateway - ACH Receiver
 - Location: St. Paul, MN
- b. Service charges may be incurred from a grantee's financial institution when a Fedwire to return interest is initiated. For FedWire returns, Fedwire account information is as follows:
- Fedwire Routing Number: 021030004
 - Agency Location Code (ALC): 75010501
 - Bank Name: Federal Reserve Bank
 - Treas NYC/Funds Transfer Division
 - Location: New York, NY
2. Interest may be returned by check using only the U.S. Postal Service; however, returning interest via check may take 4-6 weeks for processing before a check payment may be applied to the appropriate PMS account.
- a. Interests returned by check are to be mailed (USPS only) to:
- HHS Program Support Center
PO Box 979132
St. Louis, MO 63197
- A brief statement explaining the nature of the return must be included.
- b. To return interest on a grant not paid through the PMS, make the check payable to the Department of Health and Human Services, and include the following with the check:
- An explanation stating that the refund is for interest
 - The name of the awarding agency
 - The grant number(s) for which the interest was earned
 - The return should be made payable to: Department of Health and Human Services.
3. For detailed information about how to return interest, visit the PSC Returning Funds/Interest page at: [Returning Funds/Interest](#)

Grantees, including grantees that act as pass-through entities and subgrantees have other responsibilities regarding the use of Federal funds. For example, all grantees and subgrantees must have procedures for determining the allowability of costs for their awards. We highlight the following practices related to the oversight of subgrantee compliance with the financial management requirements in the Uniform Guidance that will assist State grantees (pass-through entities) in meeting their monitoring responsibilities. Under 2 CFR § 200.332, pass-through entities must –

GAN ENCLOSURE 4

Revised 03/2021

1. Evaluate each subrecipient's risk of noncompliance with Federal statutes, regulations, and the terms and conditions of the subaward for purposes of determining the appropriate subrecipient monitoring.
2. Monitor the performance and fiscal activities of the subrecipient to ensure that the subaward is used for authorized purposes, in compliance with Federal statutes, regulations, and the terms and conditions of the subaward; and that subaward performance goals are achieved.

A small number of Department grant programs have program-specific cash management and payment requirements based on the authorizing legislation or program regulations. These program-specific requirements may supplement or override general cash management or payment requirements. If you have any questions about your specific grant, please contact the Education Program Contact listed in Block 3 of your Grant Award Notification.

**RECIPIENTS OF DEPARTMENT OF EDUCATION GRANTS AND COOPERATIVE AGREEMENTS
FREQUENTLY ASKED QUESTIONS ON CASH MANAGEMENT**

Q What are the Federal Laws and Regulations Regarding Payments to the States?

A The *Cash Management Improvement Act of 1990 (CMIA)* establishes interest liabilities for the Federal and State governments when the Federal Government makes payments to the States. See 31 U.S.C. 3335 and 6503. The implementing regulations are in Title 31 of the Code of Federal Regulations (CFR), Part 205, https://www.ecfr.gov/cgi-bin/text-idx?tpl=/ecfrbrowse/Title31/31cfr205_main_02.tpl. Non-Federal entities other than States follow the rules on Federal payments set out in 2 CFR 200.305.

Q What is a Treasury-State Agreement (TSA)?

A A TSA documents the accepted funding techniques and methods for calculating interest agreed upon by the U.S. Department of the Treasury (Treasury) and a State. It identifies the Federal assistance programs that are subject to interest liabilities under the CMIA. The CMIA regulations specify a number of different funding techniques that may be used by a State but a State can negotiate with the Treasury Department to establish a different funding technique for a particular program. A TSA is effective until terminated and, if a state does not have a TSA, payments to the State are subject to the default techniques in the regulations that Treasury determines are appropriate.

Q What are the CMIA requirements for a program subject to a Treasury-State Agreement?

A Payments to a State under a program of the Department are subject to the interest liability requirements of the CMIA if the program is included in the State's Treasury-State Agreement (TSA) with the Department of Treasury. If the Federal government is late in making a payment to a State, it owes interest to the State from the time the State spent its funds to pay for expenditure until the time the Federal government deposits funds to the State's account to pay for the expenditure. Conversely, if a State is late in making a payment under a program of the Department, the State owes interest to the Federal government from the time the Federal government deposited the funds to the State's account until the State uses those funds to make a payment. For more information, GAN Enclosure 4.

Q What are the CMIA requirements for a program that is not subject to a Treasury-State Agreement?

A If a program is not included in the State's TSA, neither the State nor the Federal government are liable for interest for making late payments. However, both the Federal government and the State must minimize the time elapsing between the date the State requests funds and the date that the funds are deposited to the State's accounts. The State is also required to minimize the time elapsed between the date it receives funds from the Federal government and the date it makes a payment under the program. Also, the Department must minimize the amount of funds transferred to a State to only that needed to meet the immediate cash needs of the State. The timing and amount of funds transferred must be as close as is administratively feasible to a State's actual cash outlay for direct program costs and the proportionate share of any allowable indirect costs.

Q What if there is no TSA?

- A** When a State does not have a TSA in effect, default procedures in 31 CFR, part 205 that the Treasury Department determines appropriate apply. The default procedures will prescribe efficient funds transfer procedures consistent with State and Federal law and identify the covered Federal assistance programs and designated funding techniques.

Q Who is responsible for Cash Management?

- A** Grantees and subgrantees that receive grant funds under programs of the Department are responsible for maintaining internal controls regarding the management of Federal program funds under the Uniform Guidance in 2 CFR 200.302 and 200.303. In addition, grantees are responsible for ensuring that subgrantees are aware of the cash management and requirements in 2 CFR part 200, subpart D.

Q Who is responsible for monitoring cash drawdowns to ensure compliance with cash management policies?

- A** Recipients must monitor their own cash drawdowns **and** those of their subrecipients to assure substantial compliance to the standards of timing and amount of advances.

Q How soon may I draw down funds from the G5 grants management system?

- A** Grantees are required to minimize the amount of time between the drawdown and the expenditure of funds from their bank accounts. (See 2 CFR 200.305(b).) Funds must be drawn only to meet a grantee's immediate cash needs for each individual grant. The G5 screen displays the following message:

By submitting this payment request, I certify to the best of my knowledge and belief that the request is based on true, complete, and accurate information. I further certify that the expenditures and disbursements made with these funds are for the purposes and objectives set forth in the applicable Federal award or program participation agreement, and that the organization on behalf of which this submission is being made is and will remain in compliance with the terms and conditions of that award or program participation agreement. I am aware that the provision of any false, fictitious, or fraudulent information, or the omission of any material fact, may subject me, and the organization on behalf of which this submission is being made, to criminal, civil, or administrative penalties for fraud, false statements, false claims, or other violations. (U.S. Code Title 18, Section 1001; Title 20, Section 1097; and Title 31, Sections 3729-3730 and 3801-3812)

Q How may I use Federal funds?

- A** Federal funds must be used as specified in the Grant Award Notification (GAN) and the approved application or State plan for allowable direct costs of the grant and an allocable portion of indirect costs, if authorized.

Q What are the consequences to recipients/subrecipients for not complying with terms of the grant award?

- A** If a recipient or subrecipient materially fails to comply with any term of an award, whether stated in a Federal statute or regulation, including those in 2 CFR part 200, an assurance, the GAN, or elsewhere, the awarding agency may in accordance with 2 CFR 200.339 take one or more of the following actions:

1. Temporarily withhold cash payments pending correction of the deficiency by the non-Federal entity or more severe enforcement action by the Federal awarding agency or pass-through entity.
2. Disallow (that is, deny both use of funds and any applicable matching credit for) all or part of the cost of the activity not in compliance.
3. Wholly or partly suspend or terminate the Federal award.
4. Initiate suspension or debarment proceedings as authorized under 2 CFR part 180 and Federal award agency regulations (or in the case of a pass-through be initiated by a Federal awarding agency).
5. Withhold further Federal awards for the project or program.
6. Take other remedies that may be legally available.

Q Who is responsible for determining the amount of interest owed to the Federal government?

A As set forth in 31 CFR 205.9, the method used to calculate and document interest liabilities is included in the State's TSA. A non-State entity must maintain advances of Federal funds in interest-bearing accounts unless certain limited circumstance apply and remit interest earned on those funds to the Department of Health and Human Services, Payment Management System annually. See 2 CFR 200.305.

Q What information should accompany my interest payment?

A In accordance with 2 CFR 200.305(b)(9), interest in excess of \$500.00 earned on Federal advance payments deposited in interest-bearing accounts must be remitted annually to the Department of Health and Human Services Payment Management System (PMS) through an electronic medium using either Automated Clearing House (ACH) network or a Fedwire Funds Service payment.

For returning interest on Federal awards paid through PMS, the refund should:

- (a) Provide an explanation stating that the refund is for interest;
- (b) List the PMS Payee Account Number(s) (PANs);
- (c) List the Federal award number(s) for which the interest was earned; and
- (d) Make returns payable to: Department of Health and Human Services.

For returning interest on Federal awards not paid through PMS, the refund should:

- (a) Provide an explanation stating that the refund is for interest;
- (b) Include the name of the awarding agency;
- (c) List the Federal award number(s) for which the interest was earned; and
- (d) Make returns payable to: Department of Health and Human Services.

For additional information about returning interest see GAN ATTACHMENT 4.

Q Are grant recipients/subrecipients automatically permitted to draw funds in advance of the time they need to disburse funds in order to liquidate obligations?

A The payment requirements in 2 CFR 200.305(b) authorize a grantee or subgrantee to request funds in advance of expenditures if certain conditions are met. However, if those conditions are not met, the Department and a pass-through agency may place a payee on reimbursement.

Q For formula grant programs such as ESEA Title I, for which States distribute funds to LEAs, may States choose to pay LEAs on a reimbursement basis?

A A subgrantee must be paid in advance if it meets the standards for advance payments in 2 CFR 200.305(b)(1) but if the subgrantee cannot meet those standards, the State may put the subgrantee on reimbursement payment. See 2 CFR 200.305(b).

Q Will the Department issue special procedures in advance if G5 plans to shut down for 3 days or more?

A Yes, before any shutdown of G5 lasting three days or more, the Department issues special guidance for drawing down funds during the shut down. The guidance will include cash management improvement act procedures for States and certain State institutions of higher education and procedures for grants (including Pell grants) that are not subject to CMIA.

From: [Washington, Mark](#)
To: [Jennifer Esswein](#)
Cc: [Ryder, Ruth](#); [Hoffman, Amanda](#); [Weems, Kia](#); [Williams, Damien](#)
Subject: GRANT AWARD TERMINATION: S283B240076_EDUCATION_NORTHWEST.pdf
Date: Wednesday, February 19, 2025 4:17:35 PM
Attachments: [S283B240076_EDUCATION_NORTHWEST.pdf](#)
[image001.png](#)

Dear Federal Grant Project Director,

Please see the attached letter, informing you of the U.S. Department of Education's decision to terminate your federal grant award, because the grant is now inconsistent with, and no longer effectuates, the Department's priorities. You will receive an updated GAN notice following this email, confirming the decision and change. You will also receive notification from the Department's G5 grants administration system.

Please also note the basis for challenge or appeal of this decision, as well as the deadline to respond, as noted in the language of the attached letter. Kindly contact my colleague, Dr. Amanda Hoffman, at Amanda.Hoffman@ed.gov, with any related questions or concerns about this information or the appeals process overall.

Respectfully,

Mark Washington



Mark Washington
Deputy Assistant Secretary

United States Department of Education
Office of Elementary and Secondary Education
400 Maryland Avenue, SW | Washington, D.C. 20202
Phone: (202) 205-0167 | Mobile: (202) 549-9956 | Email: mark.washington@ed.gov



UNITED STATES DEPARTMENT OF EDUCATION
OFFICE OF SECONDARY AND ELEMENTARY EDUCATION
OFFICE OF ADMINISTRATION

2/19/2025

Jennifer Esswein
Project Director
EDUCATION NORTHWEST
1417 NW Everett Street, Suite 310
Portland, OR 97209

RE: Grant Award Termination

Dear Jennifer Esswein

This letter provides notice that the United States Department of Education is terminating your federal award, S283B240076. See 2 C.F.R. § 200.340-43; see also 34 C.F.R. § 75.253.

It is a priority of the Department of Education to eliminate discrimination in all forms of education throughout the United States. The Acting Secretary of Education has determined that, per the Department's obligations to the constitutional and statutory law of the United States, this priority includes ensuring that the Department's grants do not support programs or organizations that promote or take part in diversity, equity, and inclusion ("DEI") initiatives or any other initiatives that unlawfully discriminate on the basis of race, color, religion, sex, national origin, or another protected characteristic. Illegal DEI policies and practices can violate both the letter and purpose of Federal civil rights law and conflict with the Department's policy of prioritizing merit, fairness, and excellence in education. In addition to complying with the civil rights laws, it is vital that the Department assess whether all grant payments are free from fraud, abuse, and duplication, as well as to assess whether current grants are in the best interests of the United States.

The grant specified above provides funding for programs that promote or take part in DEI initiatives or other initiatives that unlawfully discriminate on the basis of race, color, religion, sex, national origin, or another protected characteristic; that violate either the letter or purpose of Federal civil rights law; that conflict with the Department's policy of prioritizing merit, fairness, and excellence in education; that are not free from fraud, abuse, or duplication; or that otherwise fail to serve the best interests of the United States. The grant is therefore inconsistent with, and no longer effectuates, Department priorities. See 2 C.F.R. § 200.340(a)(4); see also 34 C.F.R. § 75.253. Therefore, pursuant to, among other authorities, 2 C.F.R. § 200.339-43, 34 C.F.R. § 75.253, and the termination provisions in your grant award, the Department hereby terminates grant No. S283B240076 in its entirety effective 2/19/2025.

400 MARYLAND AVE., S.W., WASHINGTON, DC 20202
www.ed.gov

The Department of Education's mission is to promote student achievement and preparation for global competitiveness by fostering educational excellence and ensuring equal access.

ED 001833

If you wish to object to or challenge this termination decision, you must submit information and documentation supporting your position in writing within 30 calendar days of the date of this termination notice. Objections and challenges must be sent by email and first-class mail and addressed to the component head that oversees the grantmaking unit, which will typically be the Assistant Secretary of that unit. In this case, please address your objection or challenge to Ruth Ryder, Acting Assistant Secretary; Office of Elementary and Secondary Education; 400 Maryland Ave., SW; Washington, D.C. 20202; ruth.ryder@ed.gov.

Your appeal should contain the following:

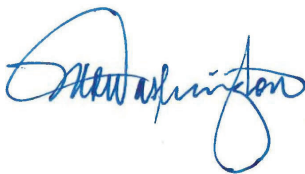
1. a copy of the written notice of termination;
2. the date you received written notice of termination;
3. a brief statement of your argument and the disputed factual, legal, or other issues;
4. the amount of funds or costs in dispute, if any; and
5. any other relevant documents.

See id. § 200.342.

Costs incurred by you after this termination are allowable only if (a) those costs were properly incurred by you before the effective date of this termination, and not in anticipation of it; and (b) those costs would be allowable if your federal award was not suspended or expired normally at the end of the period of performance in which the termination takes effect. *See* 2 C.F.R. § 200.343. You are encouraged to carefully review and discharge your closeout responsibilities set forth in 2 C.F.R. § 200.344-45 and your award agreement. Those responsibilities include, but are not limited to, your obligation to “promptly refund any unobligated funds” that have been paid out but “are not authorized to be retained.” *See* 2 C.F.R. § 200.344(g). Failure to do so will result in the Department filing a report documenting your “material failure to comply with the terms and conditions of” this award on SAM.gov and taking any other appropriate enforcement actions. *See id.* § 200.344(i).

Finally, you are reminded of your duties under your agreement and Department of Education guidance regarding retention of grant records for at least three years.

Respectfully,



Mark Washington
Deputy Assistant Secretary for Management and Planning

cc: Ruth Ryder

400 MARYLAND AVE., S.W., WASHINGTON, DC 20202
www.ed.gov

The Department of Education's mission is to promote student achievement and preparation for global competitiveness by fostering educational excellence and ensuring equal access.

ED 001834

S283B240076

Jennifer Esswein

Education Northwest

1417 NW Everett Street, Suite 310

Portland, OR 97209

S283B240076

Nicky Martin
Education Northwest
1417 NW Everett Street, Suite 310
Portland, OR 97209



**US Department of Education
Washington, D.C. 20202**

GRANT AWARD NOTIFICATION

1	RECIPIENT NAME Education Northwest 1417 NW Everett Street, Suite 310 Portland, OR 97209	2	AWARD INFORMATION <table> <tr> <td>PR/AWARD NUMBER</td><td>S283B240076</td></tr> <tr> <td>ACTION NUMBER</td><td>2</td></tr> <tr> <td>ACTION TYPE</td><td>Administrative</td></tr> <tr> <td>AWARD TYPE</td><td>Discretionary</td></tr> </table>	PR/AWARD NUMBER	S283B240076	ACTION NUMBER	2	ACTION TYPE	Administrative	AWARD TYPE	Discretionary	
PR/AWARD NUMBER	S283B240076											
ACTION NUMBER	2											
ACTION TYPE	Administrative											
AWARD TYPE	Discretionary											
3	PROJECT STAFF RECIPIENT PROJECT DIRECTOR Jennifer Esswein (503) 275-9500 jennifer.esswein@ednw.org EDUCATION PROGRAM CONTACT Elisabeth Lembo (202) 453-5823 elisabeth.lembo@ed.gov EDUCATION PAYMENT HOTLINE G5 PAYEE HELPDESK 888-336-8930 obsseed@servicenowservices.com	4	PROJECT TITLE 84.283B Region 11 Comprehensive Center									
5	KEY PERSONNEL <table> <thead> <tr> <th><u>NAME</u></th><th><u>TITLE</u></th><th><u>LEVEL OF EFFORT</u></th></tr> </thead> <tbody> <tr> <td>Jennifer Esswein</td><td>Project Director</td><td>57 %</td></tr> <tr> <td>Christine Pitts</td><td>Co- Director</td><td>57 %</td></tr> </tbody> </table>			<u>NAME</u>	<u>TITLE</u>	<u>LEVEL OF EFFORT</u>	Jennifer Esswein	Project Director	57 %	Christine Pitts	Co- Director	57 %
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6	AWARD PERIODS <table> <tr> <td>BUDGET PERIOD</td><td>10/01/2024 - 02/19/2025</td></tr> <tr> <td>PERFORMANCE PERIOD</td><td>10/01/2024 - 02/19/2025</td></tr> </table> FUTURE BUDGET PERIODS N/A			BUDGET PERIOD	10/01/2024 - 02/19/2025	PERFORMANCE PERIOD	10/01/2024 - 02/19/2025					
BUDGET PERIOD	10/01/2024 - 02/19/2025											
PERFORMANCE PERIOD	10/01/2024 - 02/19/2025											
7	AUTHORIZED FUNDING <table> <tr> <td>THIS ACTION</td><td>N/A</td></tr> <tr> <td>BUDGET PERIOD</td><td>\$3,057,651.00</td></tr> <tr> <td>PERFORMANCE PERIOD</td><td>\$3,057,651.00</td></tr> </table>			THIS ACTION	N/A	BUDGET PERIOD	\$3,057,651.00	PERFORMANCE PERIOD	\$3,057,651.00			
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PERFORMANCE PERIOD	\$3,057,651.00											
8	ADMINISTRATIVE INFORMATION <table> <tr> <td>UEI</td><td>XJA8AWALTC16</td></tr> <tr> <td>REGULATIONS</td><td>CFR PART x EDGAR AS APPLICABLE 2 CFR AS APPLICABLE</td></tr> <tr> <td>ATTACHMENTS</td><td>N/A</td></tr> </table>			UEI	XJA8AWALTC16	REGULATIONS	CFR PART x EDGAR AS APPLICABLE 2 CFR AS APPLICABLE	ATTACHMENTS	N/A			
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ATTACHMENTS	N/A											
9	LEGISLATIVE AND FISCAL DATA <table> <tr> <td>AUTHORITY:</td><td>PL X X X</td></tr> <tr> <td>PROGRAM TITLE:</td><td>COMPREHENSIVE REGIONAL ASSISTANCE CENTERS</td></tr> <tr> <td>CFDA/SUBPROGRAM NO:</td><td>84.283B</td></tr> </table>			AUTHORITY:	PL X X X	PROGRAM TITLE:	COMPREHENSIVE REGIONAL ASSISTANCE CENTERS	CFDA/SUBPROGRAM NO:	84.283B			
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PROGRAM TITLE:	COMPREHENSIVE REGIONAL ASSISTANCE CENTERS											
CFDA/SUBPROGRAM NO:	84.283B											



**US Department of Education
Washington, D.C. 20202**

S283B240076

GRANT AWARD NOTIFICATION

10

PR/AWARD NUMBER: S283B240076
RECIPIENT NAME: Education Northwest
GRANTEE NAME: EDUCATION NORTHWEST
1417 NW EVERETT ST, STE 310
PORTLAND, OR 97209 - 2653
PROGRAM INDIRECT COST TYPE: Unrestricted
PROJECT INDIRECT COST RATE: 33%

TERMS AND CONDITIONS

- (1) THE BUDGET PERIOD AND PERFORMANCE PERIOD FOR THIS PROJECT ARE CHANGED TO THE DATES IN BLOCK 6. NO ADDITIONAL FUNDS ARE PROVIDED BY THIS ACTION.
- (2) The grant is deemed to be inconsistent with, and no longer effectuates, Department priorities. See 2 C.F.R. 200.340(a) (4); see also 34 C.F.R. 75.253.

LAVANNA WEEMS Digitally signed by LAVANNA WEEMS
Date: 2025.02.19 18:10:34 -05'00'

AUTHORIZING OFFICIAL

DATE

EXPLANATION OF BLOCKS ON THE GRANT AWARD NOTIFICATION

For Discretionary, Formula and Block Grants (See Block 2 of the Notification)

1. RECIPIENT NAME - The legal name of the recipient or name of the primary organizational unit that was identified in the application, state plan or other documents required to be submitted for funding by the grant program.

2. AWARD INFORMATION - Unique items of information that identify this notification.

PR/AWARD NUMBER - A unique, identifying number assigned by the Department to each application. On funded applications, this is commonly known as the "grant number" or "document number." The PR/Award Number is also known as the Federal Award Identifying Number, or FAIN.

ACTION NUMBER - A numeral that represents the cumulative number of steps taken by the Department to date to establish or modify the award through fiscal or administrative means. Action number "01" will always be "NEW AWARD"

ACTION TYPE - The nature of this notification (e.g., NEW AWARD, CONTINUATION, REVISION, ADMINISTRATIVE)

AWARD TYPE - The particular assistance category in which funding for this award is provided, i.e., DISCRETIONARY, FORMULA, or BLOCK. If this award was made under a Research and Development grant program, the terms RESEARCH AND DEVELOPMENT will appear under DISCRETIONARY, FORMULA OR BLOCK.

3. PROJECT STAFF - This block contains the names and telephone numbers of the U.S. Department of Education and recipient staff who are responsible for project direction and oversight.

***RECIPIENT PROJECT DIRECTOR** - The recipient staff person responsible for administering the project. This person represents the recipient to the U.S. Department of Education.

EDUCATION PROGRAM CONTACT - The U.S. Department of Education staff person responsible for the programmatic, administrative and business management concerns of the Department.

EDUCATION PAYMENT CONTACT - The U.S. Department of Education staff person responsible for payments or questions concerning electronic drawdown and financial expenditure reporting.

4. PROJECT TITLE AND CFDA NUMBER - Identifies the Catalog of Federal Domestic Assistance (CFDA) subprogram title and the associated subprogram number.

5.* KEY PERSONNEL - Name, title and percentage (%) of effort the key personnel identified devotes to the project.

6. AWARD PERIODS - Project activities and funding are approved with respect to three different time periods, described below:

BUDGET PERIOD - A specific interval of time for which Federal funds are being provided from a particular fiscal year to fund a recipient's approved activities and budget. The start and end dates of the budget period are shown.

PERFORMANCE PERIOD - The complete length of time the recipient is proposed to be funded to complete approved activities. A performance period may contain one or more budget periods.

***FUTURE BUDGET PERIODS** - The estimated remaining budget periods for multi-year projects and estimated funds the Department proposes it will award the recipient provided substantial progress is made by the recipient in completing approved activities, the Department determines that continuing the project would be in the best interest of the Government, Congress appropriates sufficient funds under the program, and the recipient has submitted a performance report that provides the most current performance information and the status of budget expenditures.

7. AUTHORIZED FUNDING - The dollar figures in this block refer to the Federal funds provided to a recipient during the award periods.

***THIS ACTION** - The amount of funds obligated (added) or de-obligated (subtracted) by this notification.

***BUDGET PERIOD** - The total amount of funds available for use by the grantee during the stated budget period to this date.

***PERFORMANCE PERIOD** - The amount of funds obligated from the start date of the first budget period to this date.

RECIPIENT COST SHARE - The funds, expressed as a percentage, that the recipient is required to contribute to the project, as defined by the program legislation or regulations and/or terms and conditions of the award.

RECIPIENT NON-FEDERAL AMOUNT - The amount of non-federal funds the recipient must contribute to the project as identified in the recipient's application. When non-federal funds are identified by the recipient where a cost share is not a legislation requirement, the recipient will be required to provide the non-federal funds.

8. ADMINISTRATIVE INFORMATION - This information is provided to assist the recipient in completing the approved activities and managing the project in accordance with U.S. Department of Education procedures and regulations.

UEI - The UEI, issued in SAM.gov, is a unique 12 character organization identifier assigned to each recipient for payment purposes.

ED 001839

***REGULATIONS** - Title 2 of the Code of Federal Regulations(CFR), Part 200 as adopted at 2 CFR 3474; the applicable parts of the Education Department General Administrative Regulations (EDGAR), specific program regulations (if any), and other titles of the CFR that govern the award and administration of this grant.

***ATTACHMENTS** - Additional sections of the Grant Award Notification that discuss payment and reporting requirements, explain Department procedures, and add special terms and conditions in addition to those established, and shown as clauses, in Block 10 of the award. Any attachments provided with a notification continue in effect through the project period until modified or rescinded by the Authorizing Official.

9. LEGISLATIVE AND FISCAL DATA - The name of the authorizing legislation for this grant, the CFDA title of the program through which funding is provided, and U.S. Department of Education fiscal information.

FUND CODE, FUNDING YEAR, AWARD YEAR, ORG.CODE, PROJECT CODE, OBJECT CLASS -

The fiscal information recorded by the U.S. Department of Education's Grants Management System (G5) to track obligations by award.

AMOUNT - The amount of funds provided from a particular appropriation and project code. Some notifications authorize more than one amount from separate appropriations and/or project codes. The total of all amounts in this block equals the amount shown on the line, "THIS ACTION" (See "AUTHORIZED FUNDING" above (Block 7)).

10. TERMS AND CONDITIONS - Requirements of the award that are binding on the recipient.

***PARTICIPANT NUMBER** - The number of eligible participants the grantee is required to serve during the budget year.

***GRANTEE NAME** - The entity name and address registered in the System for Award Management (SAM). This name and address is tied to the UEI registered in SAM under the name and address appearing in this field. This name, address and the associated UEI is what is displayed in the SAM Public Search.

***PROGRAM INDIRECT COST TYPE** - The type of indirect cost permitted under the program (i.e. Restricted, Unrestricted, or Training).

***PROJECT INDIRECT COST RATE** - The indirect cost rate applicable to this grant.

***AUTHORIZING OFFICIAL** - The U.S. Department of Education official authorized to award Federal funds to the recipient, establish or change the terms and conditions of the award, and authorize modifications to the award

FOR FORMULA AND BLOCK GRANTS ONLY:

(See also Blocks 1, 2, 4, 6, 8, 9 and 10 above)

3. PROJECT STAFF - The U.S. Department of Education staff persons to be contacted for programmatic and payment questions.

7. AUTHORIZED FUNDING

CURRENT AWARD AMOUNT - The amount of funds that are obligated (added) or de-obligated (subtracted) by this action.

PREVIOUS CUMULATIVE AMOUNT - The total amount of funds awarded under the grant before this action.

CUMULATIVE AMOUNT - The total amount of funds awarded under the grant, this action included.

10. AFFILIATE - If an affiliate digital signature appears on this GAN, it is the digital signature belonging to the individual delegated the authority to affix the Authorizing Official's signature to the GAN.

* This item differs or does not appear on formula and block grants.

From: [Ryder, Ruth](#)
To: [Hoffman, Amanda](#); [Bradley, Renee](#)
Subject: FW: Appeal: Education Northwest Region 11 Comprehensive Center Award S283B240076 - CORRECTED
Date: Wednesday, March 12, 2025 7:10:44 PM
Attachments: [image001.png](#)
[CC AppealS283B240076v2.pdf](#)
[2. GAN 101370.Reg11CC.GAN.S283B240076.pdf](#)
[3. Year 1 GAN S283B240076.2.1.pdf](#)
Importance: High

From: Jessica Johnson <jessica.johnson@ednw.org>
Sent: Wednesday, March 12, 2025 7:00 PM
To: Ryder, Ruth <Ruth.Ryder@ed.gov>
Cc: Jennifer Esswein <jennifer.esswein@ednw.org>; Stuart Ferguson <stuart.ferguson@ednw.org>
Subject: Appeal: Education Northwest Region 11 Comprehensive Center Award S283B240076 - CORRECTED
Importance: High

You don't often get email from jessica.johnson@ednw.org. [Learn why this is important](#)

CAUTION: This email originated from outside of the organization. Do not click links or open attachments unless you recognize the sender and know the content is safe.

Hello Acting Assistant Secretary Ryder,

Please find attached our appeal for the Region 11 Comprehensive Assistance Center.
Per our termination letter, this appeal includes:

1. a copy of our written notice of termination,
2. the date we received notice
3. a brief statement of our argument
4. the amount of funds in dispute
5. additional documents including emails from our program officer providing evidence that our work was compliant. I have also attached separately the GAN notices.

I have also sent these documents via first class and certified mail.

Please confirm receipt of this appeal.

Thank you,

Jessica Johnson

ED 001841

Chief Executive Officer

c 630.797.0184

educationnorthwest.org





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Ruth Ryder
Acting Assistant Secretary
Office of Elementary and Secondary Education
400 Maryland Ave, SW
Washington, DC 20202
ruth.ryder@ed.gov

March 12, 2025

Acting Assistant Secretary Ryder:

Education Northwest submits this appeal¹ of the termination of federal award, **S283B240076**, the Region 11 Comprehensive Assistance Center, part of the Comprehensive Center Program (ALN #84.283B), pursuant to 2 C.F.R. § 200.342 and the Department of Education's Grant Termination Appeal Procedures.² Education Northwest received notice of the Department's decision to terminate S283B240076 on February 19, 2025. With this appeal, we seek reinstatement of the five-year award. The amount of funds in dispute are as follows. The total five-year grant award amount is \$15,288,255. By fiscal year, the grant amounts are: FY2025 \$3,057,651.00; FY2026 \$3,057,651.00; FY2027 \$3,057,651.00; FY2028 \$3,057,651.00; FY2029 \$3,057,651.00.

EDNW was founded in 1966 specifically to serve Alaska, Idaho, Montana, Oregon, and Washington. Over the past 58 years, we have worked continuously with these five states through federal Centers as well as numerous state and local projects, evolving our services in response to their shifting priorities. EDNW has operated Comprehensive Centers (CCs) in the region since their inception in 2005. Through these projects we have worked with state chiefs and other agency leaders to support state and local education systems in the translation and tailoring the evidence base in education and related fields to policies and practices most likely to drive improvements in student outcomes. In this cooperative agreement, we combined lessons learned from our 19 years operating Comprehensive Centers and 55 years operating Regional Education Laboratory Northwest with new approaches and feedback from our

¹ In submitting this appeal letter, we reserve all rights to seek relief in an appropriate judicial forum at any time. Our omission of any legal claim from this letter also does not constitute a waiver of the right to assert that claim in any future legal challenge.

² <https://www.ed.gov/media/document/grant-appeals-procedure-109496.pdf>.

operating partners and clients to deliver and manage intensive services in the post-COVID world. Our design fostered efficiency – **a key priority of this administration** – including effective performance, personnel, and partnerships through comprehensive performance management, seamless personnel and partner management, and frequent stakeholder engagement. Key projects described later in this letter were developed with state agency teams in alignment with state education chief priorities.

We received a Grant Award Notification on September 25, 2024. The grant included a period of performance from October 1, 2024 to September 30, 2029. With respect to any potential termination of the award, the sole references to termination were that the Department could terminate if “a recipient or subrecipient materially fails to comply with any term of an award,” or if “the grantee, its employees, or its subrecipients” engaged in prohibited trafficking in persons. In the cooperative agreement that we subsequently entered into, the sole reference to potential termination was that “failure to comply with the content of this agreement may result in . . . suspending or terminating the award, pursuant to 2 CFR §200.339-343.”

In the months following the grant award notification, we engaged in significant planning activities and received multiple communications and supportive feedback from the Department to advance our CC work. For example, on December 16, 2024, we received an email from the Department with a “CC Reporting At-a-Glance_October 2024” attachment that identified January 24, 2025 as the deadline for CCs to submit their first draft Annual Service Plans (ASPs) outlining an initial draft of projects to engage in with states. We met that deadline, submitting a first draft ASP with a total of 13 projects that we had planned across five states as a result of numerous meetings with state leaders. On January 28, 2025, we had a check-in call with our Program Officer (PO) who acknowledged our first draft ASP submission and advised we continue with our work. Then, on January 30, 2025, we received an email from the Department with an updated “FY24 Cohort CC Year 1 Reporting At-a-Glance-Final” attachment identifying February 28, 2025 as the deadline for providing ASP updates and receiving feedback from program officers on the first draft ASP. On February 5, 2025, we convened senior leaders within our organization to review the entire CC plan and identify priority projects. On February 10, 2025, the Department sent another email with information about when CCs would receive feedback from their POs about their ASPs as well as next steps for communicating with POs, suggesting that the ASP review process was still underway, and CCs would soon hear from their POs about ASP and project approval and next steps. We also had positive feedback and communication from the Department regarding the establishment of our CC Advisory Board. On January 9, 2025, we sent our PO a draft of our proposed Advisory Board members for review and approval. On February 14, 2025, we received email approval from our PO to move forward with establishing our CC’s Advisory Board.

On February 19, 2025, Education Northwest received notice that the Department was terminating our award under the Comprehensive Center program. Awards covering eighteen of the twenty Comprehensive Centers were terminated with identical notices alleging that the award “provides funding for programs that promote or take part in DEI initiatives or other initiatives that unlawfully discriminate on the basis of race, color, religion, sex, national origin, or another protected characteristic; that violate either the letter or purpose of Federal civil rights law; that conflict with the Department’s policy of prioritizing merit, fairness, and excellence in education; that are not free from fraud, abuse, or duplication; or that otherwise fail to serve the best interests of the United States.”³ Prior to receiving this notification, we had no indication that the Department had any concerns with our implementation of the award. [As mentioned, in the weeks leading up to the termination, we received communication from the Department indicating that it was preparing to approve time-sensitive projects and providing information for the remainder of the five-year award cycle. In fact, on February 14, 2025, five days prior to the grant termination, we received an email from the Department requesting that we send project titles and proposed start dates for projects that were time sensitive and for which we wanted to request provisional approval to begin work with the states while the Department continued to review ASPs. We responded to that email request on February 18, 2025 with a list of six projects for which we requested provisional approval to immediately begin work with states.⁴

For the reasons described below, the termination of our grant was contrary to multiple statutes, constitutional provisions, and regulations, and was also arbitrary and capricious. We respectfully request that the Department reinstate our grants immediately so we can continue to serve the students, teachers, and communities of the Region 11 Comprehensive Center (Northwest), including those in Alaska, Montana, Idaho, Washington, and Oregon.

1. The Termination Violates the Department Regulations

In its termination notice, the Department cited a provision of the Uniform Grants Guidance (UGG), 2 C.F.R. § 200.340(a)(4), as the legal authority for terminating the grant. The Department claimed that this provision authorizes the Department to terminate a grant that is “inconsistent with, and no longer effectuates, Department priorities.” That provision, however, does not authorize the Department to terminate this award based on “Department priorities.”

³ A copy of our termination notification is attached as an appendix to this letter.

⁴ Attached please find several examples of communications from the Department from the week prior to the grant termination.

The Department of Education adopts the Office of Management and Budget's Uniform Grants Guidance to serve as the Department's own regulations for federal financial assistance awards. 2 C.F.R. § 3474.1(a). In 2024, OMB revised the Uniform Grants Guidance with an effective date of October 1, 2024. The Department confirmed that the revised Uniform Grants Guidance applied to "[a]ny Discretionary grant" awarded by the Department "with a performance period start date on or after October 1, 2024." Dep't of Educ, *Frequently Asked Questions, 2 CFR Part 200*, at 4.⁵ Because the period of performance for this grant began on October 1, 2024, the revised Uniform Grant Guidance applies.

Under the revised Uniform Grants Guidance, the Department may terminate an award based on "program goals or agency priorities" only where such grounds for termination are "clearly and unambiguously" stated in the terms and conditions of the individual award. 2 C.F.R. §§ 200.340(a)(4), (b); *see also* 89 Fed. Reg. 30046, 30089 (Apr. 22, 2024). There was no such clear and unambiguous language in this award. The terms and conditions make no mention at all that the Department could potentially terminate the award based on the Department's "program goals or agency priorities."

Because this ground for termination was not specified in the award, the Department's termination of the grant was contrary to the Department's applicable regulations and thus contrary to law. The grant must be reinstated in these circumstances. *See, e.g., Healthy Futures of Texas v. Dep't of Health & Hum. Servs.*, 315 F. Supp. 3d 339, 348 (D.D.C. 2018); *Pol'y & Rsch., LLC v. Dep't of Health & Hum. Servs.*, 313 F. Supp. 3d 62 (D.D.C. 2018); *Planned Parenthood of Greater Washington & N. Idaho v. Dep't of Health & Hum. Servs.*, 328 F. Supp. 3d 1133 (E.D. Wash. 2018); *Healthy Teen Network v. Azar*, 322 F. Supp. 3d 647 (D. Md. 2018).

2. The Termination Violates the Statute Establishing Comprehensive Centers

In terminating eighteen of the twenty comprehensive center awards, including our award, the Department has violated the statute establishing the Comprehensive Center program.

Congress established the Comprehensive Centers through the Educational Technical Assistance Act of 2002. In that Act, Congress mandated that the Department must award "not less than" 20 grants to local entities or groups to serve as Comprehensive Centers. 20 U.S.C. § 9602(a)(1). The Act further directed that the Secretary of Education "shall ensure that not less than 1 comprehensive center is established in each of the 10 geographic regions served by the geographic regions served by the regional educational laboratories." *Id.* § 9602(a)(2)(A).

⁵ <https://www.ed.gov/media/document/faqs-uniform-guidance-107433.pdf>.

Congress further created a detailed structure for the Comprehensive Center program, including regional advisory committees and directives on how the Centers would interact with the Department and local stakeholders. The complicated structure involves coordination with advisory boards, the Department, Regional Education Laboratories, state agencies, and other regional providers. 20 U.S.C. §§ 9602(f)-(h). This type of coordination takes time and provides the specific mechanisms for each Comprehensive Center to ensure their work is reflective of and responsive to local needs. As such, although Congress did not directly mandate five-year grants, it did require grant applicants to include a five-year implementation plan. *Id.* § 9602(c)(2).

In terminating eighteen out of the twenty Comprehensive Center awards, the Department has effectively shut down this statutorily required program for FY2025, and the Department has not given any indication it intends to correct this violation for future years. Due to the terminations, the Department is failing to maintain “not less than 20 grants” for Comprehensive Centers, and is not “ensur[ing] that not less than 1 comprehensive center is established in each of the 10 geographic regions served by the regional educational laboratories,” as required by law. The congressional scheme requiring Comprehensive Centers, regional advisory councils, coordination with stakeholders, annual reports, and five-year programs has been abandoned. Because the complicated structure Congress created is time-consuming to implement, the only way to correct this violation of the Department’s statutory requirements is to immediately reinstate the terminated awards, including ours.

3. The Termination Was Arbitrary and Capricious

The termination of our grant is “arbitrary and capricious” agency action in violation of the Administrative Procedure Act (APA). 5 U.S.C. § 706(2)(A).

The APA’s prohibition on arbitrary and capricious agency action requires agencies “to examine all relevant factors and record evidence, and to articulate a reasoned explanation for [their] decision[s].” *Am. Wild Horse Pres. Campaign v. Perdue*, 873 F.3d 914, 923 (D.C. Cir. 2017). To do so, “the agency must examine the relevant data and articulate a satisfactory explanation for its action including a ‘rational connection between the facts found and the choice made.’” *Motor Vehicle Mfrs. Ass’n of U.S., Inc. v. State Farm Mut. Auto. Ins. Co.*, 463 U.S. 29, 43 (1983). Agency action fails to satisfy this standard if the agency “failed to consider an important aspect of the problem, *id.*, or if it “offer[s] an explanation for its decision that runs counter to the evidence before the agency,” *Am. Wild Horse*, 873 F.3d at 923.

The Department's termination notice claimed that our performance of the grant violated civil rights laws by promoting or engaging in DEI initiatives. The notice provided no specific examples how our performance under the grant constitutes unlawful action, nor could it have.

Rather, the Department appears to have simply relied on edited videos, posted to X by Christopher Rufo only hours before the termination,⁶ of alleged "race-based discrimination and gender identity ideology" promoted by Comprehensive Centers.⁷ The Department's press release linked directly to Rufo's posts. But the evidence cited by Rufo, and in turn the Department, has no rational connection to our performance under this grant. Rather, the videos are from prior award cycles and at least in some instances, involved companies no longer participating in the Comprehensive Center program. And the descriptions of the videos are based on misleading editing by Rufo. These videos did not constitute fact finding related to our award at all. In fact, there is nothing in any of these examples related to any work performed or proposed by Education Northwest.

Thus, the Department did not articulate a "rational connection between the facts found and the choice made" to terminate the CCs in the current grant cycle. *Motor Vehicle Mfrs. Ass'n*, 463 U.S. at 3 (1983). The Department clearly "offered an explanation for its decision that runs counter to the evidence before the agency," *Am. Wild Horse Pres. Campaign*, 873 F.3d at 923. A handful of examples from prior award cycles – even if the descriptions of those projects had been accurate, which they are not – simply have no bearing on our work under this particular grant. The Department has pointed to no evidence or information concerning work under the current grant that could rationally explain a change in the agency's decision to fund the grants. As such, the Department's termination decision is arbitrary and capricious.

4. The Termination Violates the 2024 Appropriations Act and the Constitution

The termination is also unlawful because it violates the Further Consolidated Appropriations Act of 2024 ("the 2024 Appropriations Act") and the constitutional separation of powers. In the 2024 Appropriations Act, Congress mandated that the Department spend a specific sum of money on the Comprehensive Center program, and the Department is violating that mandate by refusing to spend the money Congress appropriated.

⁶ Christopher F. Rufo (@realchrisrufo), X (Feb. 18, 2025, 4:53 PM), <https://x.com/realchrisrufo/status/1891969358605451425>; Christopher F. Rufo (@realchrisrufo), X (Feb. 18, 2025, 1:30 PM), <https://x.com/realchrisrufo/status/1891918103682187593>; Christopher F. Rufo (@realchrisrufo), X (Feb. 18, 2025, 3:39 PM), <https://x.com/realchrisrufo/status/1891950617054113826>; Christopher F. Rufo (@realchrisrufo), X (Feb. 18, 2025, 12:36 PM), <https://x.com/realchrisrufo/status/1891904521330098647?mx=2>.

⁷ Press Release, *U.S. Department of Education Cancels Divisive and Wasteful Grants under the Comprehensive Centers Program* (Feb. 19, 2025).

Congress provided in the 2024 Appropriations Act that, of the \$5.78 billion lump-sum appropriated for carrying out school improvement activities, “\$50,000,000 shall be available to carry out section 203 of the Educational Technical Assistance Act of 2002,” which is the Comprehensive Center program. Pub. L. 118-47, 138 Stat 460, 683 (Mar. 23, 2024). This “shall be available” language represents an earmark for the Comprehensive Center program. The Government Accountability Office (GAO) has held that this language means the agency must spend the earmarked amount on the designated program and may not divert it for other purposes covered by the lump-sum appropriation. GAO, *Small Business Administration—Availability of Appropriations for Loan Modernization and Accounting System*, B-326941, at 7 (Dec. 10, 2015).

Given that the Department has terminated eighteen of the twenty Comprehensive Center awards and has no intent to re-award the funds, the Department will surely fail to spend the \$50,000,000 mandated by Congress for this program before the funds expire on September 30, 2025. The failure to spend the full \$50,000,000 before expiration violates the 2024 Appropriations Act.

The Supreme Court has made clear that an agency’s failure to spend a specific sum of money mandated by Congress on a program is unlawful and will result in a court ordering the agency to spend the money. In *Train v. City of New York*, 420 U.S. 35 (1975), the Supreme Court held that President Nixon had unlawfully directed the Environmental Protection Agency not to expend the full amount of money that Congress directed be spent under a statute. The Court held that the agency lacked discretion to spend less than the full sums that Congress directed, and the Court accordingly affirmed an order directing the agency to spend those full sums. See *id.* at 42-49. Here, as in *Train*, Congress has directed the Department to spend a specific sum of money on the Comprehensive Center program, and the Department lacks discretion not to do so.

The Department’s failure to spend the money appropriated by Congress for the program also violates the constitutional separation of powers. The Constitution empowers Congress to make laws, U.S. Const. art. I, § 1, and requires the President to faithfully execute those laws, *id.* art. II, § 3. Congress’s powers to set the policies of the nation are at their apex when it comes to spending money, as the Constitution “exclusively grants the power of the purse to Congress, not the President. *City & Cnty. of San Francisco v. Trump*, 897 F.3d 1225, 1238 (9th Cir. 2018) (citing U.S. Const. art. I, §§ 8, 9).

From these first principles, it has been long recognized that Presidents have no inherent constitutional authority to block, amend, or subvert appropriations enacted into law by Congress. “[T]he President is without authority to thwart congressional will by canceling appropriations passed by Congress.” *San Francisco*, 897 F.3d at 1231; *see also In re Aiken Cnty.*, 725 F.3d 255, 261 n.1 (D.C. Cir. 2013) (Kavanaugh, J.) (explaining that “the President does not have unilateral authority to refuse to spend [appropriated] funds”).

Here, the Department lacked the constitutional authority to refuse to spend the money that Congress appropriated for the Comprehensive Center program. The termination thus violates the constitutional separation of powers.

5. The Termination Violates the Impoundment Control Act

The termination likewise violates the Impoundment Control Act of 1974. That Act sets forth limited circumstances in which an agency may “defer” or “rescind” appropriated funds, none of which are met here.

Under the ICA, a “deferral” encompasses any “withholding or delaying the obligation or expenditure of” appropriated funds, as well as “any other type of Executive action or inaction which effectively precludes the obligation or expenditure of” appropriated funds. 2 U.S.C. § 682(1). When the Executive Branch wishes to defer funds, it must send a special message to Congress detailing the money to be deferred and the reasons for deferral. 2 U.S.C. § 684(a).

There are only three permissible grounds for deferrals: (1) “to provide for contingencies;” (2) “to achieve savings made possible by or through changes in requirements or greater efficiency of operations;” or (3) “as specifically provided by law.” 2 U.S.C. § 684(b). GAO has made clear that policy reasons, including efforts to ensure funds are spent consistent with the President’s policy preferences, are not a proper basis for deferrals. GAO, *Office of Management and Budget—Withholding of Ukraine Security Assistance*, B-331564, at 6 (Jan. 16, 2020).

Where the Executive Branch seeks to “rescind” appropriated funds, the ICA requires that the President send a special message to Congress specifying the funds he seeks to have rescinded and the reasons for his proposal. 2 U.S.C. § 683(a).

The termination here is both an unlawful rescission and an unlawful deferral. It is a rescission because, as explained above, the Department has rescinded grants that comprise the vast majority of the \$50,000,000 that Congress directed the Department to spend on the Comprehensive Center program, and the Department has no realistic way to spend those funds

on the program before they expire on September 30, 2025. The Department thus has rescinded funds, without following the ICA's required procedures for proposing a rescission.

The termination is also a textbook deferral. By terminating the grant and precluding performance of the award, the Department plainly is "withholding or delaying the obligation or expenditure of" funds. 2 U.S.C. § 682(1). If the grant had not been terminated, the appropriated funds would be promptly spent, but now their expenditure is indefinitely delayed. The Department did not follow the ICA's required procedure for notifying Congress of a deferral, nor could it have because the reason for the termination was, by the Department's own admission, policy objections and not any of the ICA's acceptable reasons for a deferral.

Nor can the termination constitute a "programmatic delay." GAO has explained that "programmatic delays occur when an agency is taking necessary steps to implement a program, but because of factors external to the program, funds temporarily go unobligated." B-331564, at 7. Programmatic delays are meant "to *advance* congressional budgetary policies by ensuring that congressional programs are administered efficiently." *City of New Haven v. United States*, 809 F.2d 900, 909 (D.C. Cir. 1987). Permissible programmatic delays do not include when the Executive Branch withholds money "on its own volition" to "ensure compliance with presidential policy prerogatives." B-331564, at 7. The delay in spending funds here was precisely to "ensure compliance with presidential policy prerogatives." B-331564, at 7, and thus is not a programmatic delay.

The only way for the Department to cure this unlawful deferral is to immediately restore the grant and its distribution of funding. Any other action, such as re-competing the award, would take substantial time and add to the very delay that is underlying this violation.

6. The Termination Violates the Due Process Clause Because It Is Based on an Executive Order That Is Unconstitutionally Vague

Finally, the Department's termination of our award clearly arose from the now-enjoined Executive Order (EO) directing agencies to terminate "DEI" grants and contracts. As a federal district court has already concluded, the termination provision of the EO is unconstitutionally vague, and the unconstitutionality of the EO renders the termination of our award unconstitutional as well.

As the Department is aware, on January 20, President Trump signed Executive Order 14151, Ending Radical and Wasteful Government DEI Programs and Preferencing (EO). Among other things, the EO directed agencies to terminate "equity-related" grants or contracts, but did not

define DEI or “equity-related” or otherwise provide guidance on how to apply the directive. Just days after the Executive Order, the Department announced that, “[f]ollowing President Trump’s recent Executive Orders,” the Department had taken action “to eliminate harmful Diversity, Equity, and Inclusion (DEI) initiatives.” The Department then made clear that it would “continue its comprehensive review of all agency programs and services to identify additional initiatives and working groups that may be advancing a divisive DEI agenda.” Press Release, U.S. Department of Education Takes Action to Eliminate DEI (Jan. 23, 2025).

That EO has now been preliminarily enjoined. *Nat’l Ass’n of Diversity Officers in Higher Educ. v. Trump*, No. 1:25-cv-00333-ABA, ECF No. 44 (D. Md. Feb. 21, 2025) (PI Ruling). The court found that the EO’s termination provision is likely unconstitutionally vague in violation of the Fifth Amendment’s Due Process Clause. because the term “equity-related” created “the very real possibility of arbitrary and discriminatory enforcement,” and the EO did not provide grantees and contractors sufficient notice about “what, if anything, they can do to bring their grants into compliance such that they are not considered ‘equity-related.’” See PI Ruling at 40-42. The injunction prohibits the agencies involved in the case, including the Department of Education, from terminating *any* contracts and grants based on the EO.

While the Department did not specifically cite to the EO in our termination notification, the EO clearly was the driving force behind the termination. Indeed, the termination notification echoed the EO’s directive and broadly asserted that our work “promote[s] or take[s] part in DEI initiatives or other initiatives that unlawfully discriminate on the basis of race, color, religion, sex, national origin, or another protected characteristic.” There can be no dispute that the purported role of DEI in our work was the Department’s basis for ending the award.

For the same reasons that the district court found it likely that the EO is unconstitutionally vague on its face, the EO is unconstitutional as applied to the termination of our award. The termination certainly demonstrates “arbitrary enforcement.” Our Cooperative Agreement had no clear relationship to DEI or the goals of diversity, equity, or inclusion. The Comprehensive Centers take on work as requested by states, districts, and schools, aligned with statutory and Department-identified priorities. The draft ASP that we submitted to the Department on January 24th included thirteen proposed projects developed in collaboration with state leaders that focused on improving states’ education systems related to teaching and learning, not DEI.

Moreover, the fact that two of the twenty Comprehensive Centers were not terminated, for reasons not publicly explained, shows the arbitrariness of these terminations.

The termination letter also makes clear how little notice we had of what the EO actually covers. Our termination notice and the press release accompanying it are so devoid of relevant content that it is impossible to identify what standard the Department may have used, if indeed it used any standard at all, in deciding to terminate our award based on supposed DEI concerns. To this day, we have no additional information about why our award was terminated or what work the Department believed was "promoting or taking part in DEI initiatives." The only information the Department has provided other than the non-specific language in the termination notice came through the press release in which the Department claimed that the Comprehensive Centers writ large "have been forcing radical agendas onto states and systems, including race-based discrimination and gender identity ideology."⁸ The press release did not include a single example relating to our Comprehensive Center, nor could it have.

We simply do not engage in any activities that could be considered discriminatory. Rather, the proposed work for this fiscal year, designed in collaboration with the five states, for the Northwest CC included:

- Projects to support the state of **Alaska** focused on addressing teacher shortages, supporting literacy initiatives, and advancing career and technical education (CTE) opportunities.
- Projects to support the state of **Idaho** focused on improving data governance and progress monitoring for schools and districts in need of improvement.
- Projects to support the state of **Montana** focused on addressing educator shortages, enhancing math and ELA instruction, and improving the state's profile of a graduate.
- A project to support the state of **Oregon** focused on strategic planning.
- A project to support the state of **Washington** focused on implementing new learning standards.

These projects have been suspended to the detriment of states, schools, and students.

Moreover, had the Department identified any activities it was concerned about, it had ample opportunity to provide that feedback and work with us to address any concerns moving forward. By design, each of our projects takes place at the request of the local community and only after approval from the Department. We were in the midst of that approval process when we received the termination notification, without any relevant concerns raised by the Department.

⁸ Press Release, *U.S. Department of Education Cancels Divisive and Wasteful Grants under the Comprehensive Centers Program* (Feb. 19, 2025), <https://www.ed.gov/about/news/press-release/us-department-of-education-cancels-divisive-and-wasteful-grants-under-comprehensive-centers-program>.

The termination of our award reflects the precise kind of arbitrary enforcement and lack of notice that formed the basis of the PI Ruling. The termination therefore violates the Due Process Clause.

For all of the reasons provided above, the Department's termination of our grant was unlawful, and the award should be immediately reinstated. Thank you for your time and consideration of this matter.

Sincerely,

DocuSigned by:

7A842ADF31014D6...
Jessica Johnson
Chief Executive Officer

Signed by:

7ACF13BB55DC467...
Jennifer Esswein
Project Director

APPENDIX

This appendix includes:

- A copy of written notice of termination
- Award notification email
- Several other email correspondences demonstrating our compliance with program officer requests as well as program officer approvals



UNITED STATES DEPARTMENT OF EDUCATION
OFFICE OF SECONDARY AND ELEMENTARY EDUCATION
OFFICE OF ADMINISTRATION

2/19/2025

Jennifer Esswein
Project Director
EDUCATION NORTHWEST
1417 NW Everett Street, Suite 310
Portland, OR 97209

RE: Grant Award Termination

Dear Jennifer Esswein

This letter provides notice that the United States Department of Education is terminating your federal award, S283B240076. See 2 C.F.R. § 200.340-43; see also 34 C.F.R. § 75.253.

It is a priority of the Department of Education to eliminate discrimination in all forms of education throughout the United States. The Acting Secretary of Education has determined that, per the Department's obligations to the constitutional and statutory law of the United States, this priority includes ensuring that the Department's grants do not support programs or organizations that promote or take part in diversity, equity, and inclusion ("DEI") initiatives or any other initiatives that unlawfully discriminate on the basis of race, color, religion, sex, national origin, or another protected characteristic. Illegal DEI policies and practices can violate both the letter and purpose of Federal civil rights law and conflict with the Department's policy of prioritizing merit, fairness, and excellence in education. In addition to complying with the civil rights laws, it is vital that the Department assess whether all grant payments are free from fraud, abuse, and duplication, as well as to assess whether current grants are in the best interests of the United States.

The grant specified above provides funding for programs that promote or take part in DEI initiatives or other initiatives that unlawfully discriminate on the basis of race, color, religion, sex, national origin, or another protected characteristic; that violate either the letter or purpose of Federal civil rights law; that conflict with the Department's policy of prioritizing merit, fairness, and excellence in education; that are not free from fraud, abuse, or duplication; or that otherwise fail to serve the best interests of the United States. The grant is therefore inconsistent with, and no longer effectuates, Department priorities. See 2 C.F.R. § 200.340(a)(4); see also 34 C.F.R. § 75.253. Therefore, pursuant to, among other authorities, 2 C.F.R. § 200.339-43, 34 C.F.R. § 75.253, and the termination provisions in your grant award, the Department hereby terminates grant No. S283B240076 in its entirety effective 2/19/2025.

400 MARYLAND AVE., S.W., WASHINGTON, DC 20202
www.ed.gov

The Department of Education's mission is to promote student achievement and preparation for global competitiveness by fostering educational excellence and ensuring equal access.

ED 001856

If you wish to object to or challenge this termination decision, you must submit information and documentation supporting your position in writing within 30 calendar days of the date of this termination notice. Objections and challenges must be sent by email and first-class mail and addressed to the component head that oversees the grantmaking unit, which will typically be the Assistant Secretary of that unit. In this case, please address your objection or challenge to Ruth Ryder, Acting Assistant Secretary; Office of Elementary and Secondary Education; 400 Maryland Ave., SW; Washington, D.C. 20202; ruth.ryder@ed.gov.

Your appeal should contain the following:

1. a copy of the written notice of termination;
2. the date you received written notice of termination;
3. a brief statement of your argument and the disputed factual, legal, or other issues;
4. the amount of funds or costs in dispute, if any; and
5. any other relevant documents.

See id. § 200.342.

Costs incurred by you after this termination are allowable only if (a) those costs were properly incurred by you before the effective date of this termination, and not in anticipation of it; and (b) those costs would be allowable if your federal award was not suspended or expired normally at the end of the period of performance in which the termination takes effect. *See* 2 C.F.R. § 200.343. You are encouraged to carefully review and discharge your closeout responsibilities set forth in 2 C.F.R. § 200.344-45 and your award agreement. Those responsibilities include, but are not limited to, your obligation to “promptly refund any unobligated funds” that have been paid out but “are not authorized to be retained.” *See* 2 C.F.R. § 200.344(g). Failure to do so will result in the Department filing a report documenting your “material failure to comply with the terms and conditions of” this award on SAM.gov and taking any other appropriate enforcement actions. *See id.* § 200.344(i).

Finally, you are reminded of your duties under your agreement and Department of Education guidance regarding retention of grant records for at least three years.

Respectfully,



Mark Washington

Deputy Assistant Secretary for Management and Planning

cc: Ruth Ryder

400 MARYLAND AVE., S.W., WASHINGTON, DC 20202
www.ed.gov



Outlook

PR/Award # S283B240076 Application for New Awards in the Fiscal Year 2024 Comprehensive Centers Program Competition

From Jones, Desmond (Contractor) <Desmond.Jones@ed.gov>

Date Wed 9/25/2024 3:43 PM

To Jennifer Esswein <jennifer.esswein@ednw.org>

Cc Proposals <proposals@ednw.org>; OESE.ComprehensiveCenters <OESE.ComprehensiveCenters@ed.gov>; Smith, Danielle <Danielle.Smith2@ed.gov>; Daley, Michelle <Michelle.Daley@ed.gov>

 2 attachments (443 KB)

S283B240076_Education Northwest_Technical Review Form.pdf; S283B240076_Education Northwest.pdf;

<<EXTERNAL>>

Dear Dr. Esswein:

On behalf of the U.S. Department of Education (Department), we are pleased to inform you that Education Northwest's application submitted to the Fiscal Year (FY) 2024 Comprehensive Centers program (ALN #84.283B) grant competition to operate the Region 11 (Northwest) Center has been selected for funding. We look forward to working with you in the coming years to improve educational opportunities and outcomes, close achievement gaps, and improve the quality of instruction for all students, and particularly for groups of students with the greatest need.

Please see the attached letter for further information.

Sincerely,

Program and Grantee Support Services

ED 001858

Attachments: CC Reporting At-a-Glance_October 2024.pdf

From: Daley, Michelle <Michelle.Daley@ed.gov>

Sent: Monday, December 16, 2024 10:03 AM

To: Cushing, Ellen <ecushing@air.org>; Allison Crean Davis <allisoncreandavis@westat.com>; Jill Lammert <JillLammert@westat.com>; Risa Sackman <rsackman@fhi360.org>; Karen Maldonado <KMaldonado@fhi360.org>; Hoffman, Kerry <kerry.hoffman@icf.com>; Amy Lamitie <amy.lamitie@aemcorp.com>; Kimberly Hambrick <kimberlyhambrick@westat.com>; Brad Keller <BradKeller@westat.com>; Laura Taylor <laurataylor@westat.com>; Priscilla Maynor <pmaynor@serve.org>; George Hancock <ghancock@serve.org>; Robin Jarvis <jarvis@rmcres.com>; Butler, Aaron <abutler@air.org>; blyke@air.org; Joe Simpson <jsimpson@mcrel.org>; Katie Allen <kallen@mcrel.org>; Rich Resendez <rresendez@mcrel.org>; Kristin Nafziger <kristinnafziger@westat.com>; Scala, Jennifer (Jenny) <jscala@air.org>; Espinoza, Alicia <aespinoza@air.org>; Jennifer Esswein <jennifer.esswein@ednw.org>; Cortney Rowland <Cortney.Rowland@ednw.org>; kapono@thepaf.org; bcronkright@childtrends.org; Sinton Soalablai <ssoalablai@mcrelpalau.org>; Susan Shebby <sshebby@mcrel.org>; rsalley@wested.org; Mario Molina <mmolina@wested.org>; Magaly.Lavadenz@Imu.edu; Sheila Briggs <sbriggs@education-first.com>; tmpowel8@asu.edu; lgordo13@asu.edu; bhoward-brown@air.org; Colyott, Jim <jcolyott@air.org>; Nash, Fredrica <fnash@rti.org>; Wisniewski, Robin <rwisniewski@rti.org>

Cc: Smith, Danielle <Danielle.Smith2@ed.gov>; Zevin, Sarah <Sarah.Zevin@ed.gov>; Kelts, Erin <Erin.Kelts@ed.gov>; Newton, Esley <esley.newton@ed.gov>; Meyer, Rebekka <rebekka.meyer@ed.gov>

Subject: FY2024-2025 Year-at-a Glance Calendar

<<EXTERNAL>>

Greetings, Directors,

I hope your week is off to a great start! To help you stay organized and prepared for the year ahead, we are sharing the **Comprehensive Centers (CC) Program Year-at-a Glance** calendar, which outlines key deliverables and due dates for the upcoming year. Please take a moment to review the calendar to ensure that you are aware of all relevant due dates. If you have any questions, please reach out to your program officer.

Best,
Michelle

Michelle Daley, Ed.D.

Group Leader, Program and Grantee Support Services

Office of Elementary and Secondary Education | United States Department of Education

ED 001859

400 Maryland Avenue SW | Washington, D.C. 20202

Email: Michelle.Daley@ed.gov



UNITED STATES DEPARTMENT OF EDUCATION
OFFICE OF ELEMENTARY AND SECONDARY EDUCATION

Office of Program and Grantee Support Services

**Comprehensive Centers Program
Summary of Year 1 Reporting Deadlines**

Cooperative Agreement for Years 1-5	
Signed 60 Days After the Award	November 25, 2024

Reporting Period	Deadline
Annual Service Plan (ASP)	
October 1, 2024 - September 30, 2025 - First Draft	January 24, 2025
October 1, 2024 - September 30, 2025 - Updated	February 15, 2025
Draft Year 1 Budget	
October 1, 2024 – September 30, 2025	January 24, 2025
Updated Indirect Cost Agreement(s), if applicable	
October 1, 2024 – September 30, 2025	January 24, 2025
Draft Communications & Dissemination Plan	
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Partnership Agreements & MOUs	
October 1, 2024 – September 30, 2025	December 27, 2024
Year 1 Annual Performance Report & Federal Financial Report	
October 1, 2024– April 30, 2025	May 30, 2025
Quarterly Progress Report	
April 1, 2025- June 30, 2025	July 15, 2025
July 1, 2025 - September 30, 2025	October 15, 2025
Year 1 Annual Evaluation Report	
October 1, 2024 – September 30, 2025	December 31, 2025

Reporting Period	Deadline
REL-CC Joint Needs Sensing	
REL-CC Joint Needs Sensing Memo Update	Spring 2025

Note: Year 1 reporting deadlines are accurate as of October 2024. Deadlines are subject to change pending notification from the Program Office.

400 MARYLAND AVE., S.W., WASHINGTON, DC 20202
www.ed.gov

The Department of Education's mission is to promote student achievement and preparation for global competitiveness by fostering educational excellence and ensuring equal access.

ED 001862

Attachments: image001.png

From: Daley, Michelle <Michelle.Daley@ed.gov>

Sent: Thursday, January 30, 2025 12:41 PM


To: Cushing, Ellen <ecushing@air.org>; Risa Sackman <rsackman@fhi360.org>; 'Karen Maldonado' <KMaldonado@fhi360.org>; 'Hoffman, Kerry' <kerry.hoffman@icf.com>; 'Amy Lamitie' <amy.lamitie@aemcorp.com>; Kimberly Hambrick <kimberlyhambrick@westat.com>; 'Brad Keller' <BradKeller@westat.com>; Laura Taylor <laurataylor@westat.com>; 'Priscilla Maynor' <pmaynor@serve.org>; 'George Hancock' <ghancock@serve.org>; Robin Jarvis <jarvis@rmcres.com>; Butler, Aaron <abutler@air.org>; 'blyke@air.org' <blyke@air.org>; Katie Allen <kallen@mcrel.org>; 'Rich Resendez' <rresendez@mcrel.org>; Kristin Nafziger <kristinnafziger@westat.com>; 'Scala, Jennifer (Jenny)' <jscala@air.org>; 'Espinoza, Alicia' <aespinoza@air.org>; Jennifer Esswein <jennifer.esswein@ednw.org>; 'kapono@thepaf.org' <kapono@thepaf.org>; 'bcronkright@childtrends.org' <bcronkright@childtrends.org>; 'Sinton Soalabai' <ssoalabai@mcrelpalau.org>; Susan Shebby <sshebby@mcrel.org>; 'rsalley@wested.org' <rsalley@wested.org>; 'Mario Molina' <mmolina@wested.org>; Joe Simpson <jsimpson@mcrel.org>; Cortney Rowland <Cortney.Rowland@ednw.org>; Magaly Lavadenz@Imu.edu <Magaly.Lavadenz@Imu.edu>; Jill Lammert <JillLammert@westat.com>; Carrie Murthy <CarrieMurthy@Westat.com>; Wisniewski, Robin <rwisniewski@rti.org>; Nash, Fredrica <fnash@rti.org>; Colyott, Jim <jcolyott@air.org>; bhoward-brown@air.org <bhoward-brown@air.org>; lgordo13@asu.edu <lgordo13@asu.edu>; tmpowel8@asu.edu <tmpowel8@asu.edu>; Sheila Briggs <sbriggs@education-first.com>; Magaly.Lavadenz@Imu.edu <Magaly.Lavadenz@Imu.edu>

Cc: Newton, Esley <esley.newton@ed.gov>; Zevin, Sarah <Sarah.Zevin@ed.gov>; Lembo, Elisabeth <Elisabeth.Lembo@ed.gov>; Meyer, Rebekka <rebekka.meyer@ed.gov>

Subject: UPDATED: Year-at-a Glance

<<EXTERNAL>>

Hello,

The  [FY24 Cohort CC Year 1 Reporting At-a-Glance-Final.pdf](#) document has been updated to include the deadline for your program officer to provide updates on your ASP. If you are unable to access the document via the link, please let us know.

Best,

The PGSS Team

Michelle Daley, Ed.D.

Group Leader, Program and Grantee Support Services

Office of Elementary and Secondary Education | United States Department of Education

400 Maryland Avenue SW | Washington, D.C. 20202

ED 001863

Email: Michelle.Daley@ed.gov

Attachments: image001.png, image002.png

From: Daley, Michelle <Michelle.Daley@ed.gov>

Sent: Monday, February 10, 2025 8:18 AM

To: Cushing, Ellen <ecushing@air.org>; Risa Sackman <rsackman@fhi360.org>; Karen Maldonado <KMaldonado@fhi360.org>; Hoffman, Kerry <kerry.hoffman@icf.com>; Amy Lamitie <amy.lamitie@aemcorp.com>; Kimberly Hambrick <kimberlyhambrick@westat.com>; Brad Keller <BradKeller@westat.com>; Laura Taylor <laurataylor@westat.com>; Priscilla Maynor <pmaynor@serve.org>; George Hancock <ghancock@serve.org>; Robin Jarvis <jarvis@rmcres.com>; Joe Simpson <jsimpson@mcrel.org>; Katie Allen <kallen@mcrel.org>; Rich Resendez <rresendez@mcrel.org>; Kristin Nafziger <kristinnafziger@westat.com>; Scala, Jennifer (Jenny) <jscala@air.org>; Cortney Rowland <Cortney.Rowland@ednw.org>; Espinoza, Alicia <aespinoza@air.org>; Jennifer Esswein <jennifer.esswein@ednw.org>; kapono@thepaf.org <kapono@thepaf.org>; Ben Cronkright <BCronkright@mcrel.org>; Sinton Soalabla <ssoalabla@mcrelpalau.org>; Susan Shebby <sshebby@mcrel.org>; rsalley@wested.org <rsalley@wested.org>; Mario Molina <mmolina@wested.org>; Magaly.Lavadenz@Imu.edu <Magaly.Lavadenz@Imu.edu>; Sheila Briggs <sbriggs@education-first.com>; tunette.powell@asu.edu <tunette.powell@asu.edu>; lgordo13@asu.edu <lgordo13@asu.edu>; bhoward-brown@air.org <bhoward-brown@air.org>; Colyott, Jim <jcolyott@air.org>; Nash, Fredrica <fnash@rti.org>; Wisniewski, Robin <rwisniewski@rti.org>; Jill Lammert <JillLammert@westat.com>; Carrie Murthy <CarrieMurthy@Westat.com>

Cc: Zevin, Sarah <Sarah.Zevin@ed.gov>; Kelts, Erin <Erin.Kelts@ed.gov>; Lembo, Elisabeth <Elisabeth.Lembo@ed.gov>; Newton, Esley <esley.newton@ed.gov>; Meyer, Rebekka <rebekka.meyer@ed.gov>



Subject: Revised Due Dates for Year-at-a Glance Submissions

<<EXTERNAL>>

Greetings, Center Directors,

I hope you had a great weekend! We are reaching out to inform you of a revision to the Year-at-a Glance due dates. Please see below updated timeline below, which reflects the revised deadline for key submissions. These adjustments are intended to allow ample time for feedback and revisions.

- **Revised Due Date for RCs to Receive Feedback from POs:** February 28, 2025.
- **Next Steps:** Your PO will provide the due date for incorporating the feedback for submission. Content Centers will also receive specific due dates from their POs for both feedback and final submission).

The  [FY24 Cohort CC Year 1 Reporting At-a-Glance-Final_Revised 20250210.pdf](#) has been uploaded to the  [Resources](#) folder. If you are unable to access the file, please let us know.

If there are any questions, please reach out to your PO. Have a great day!

Best,
Michelle

Michelle Daley, Ed.D.

Group Leader
The Office of Program and Grantee Support Services
U.S. Department of Education

Email Address: Michelle.Daley@ed.gov

Phone Number: (202) 987-1057



UNITED STATES DEPARTMENT OF EDUCATION
OFFICE OF ELEMENTARY AND SECONDARY EDUCATION

Office of Program and Grantee Support Services

**Comprehensive Centers Program
Summary of Year 1 Reporting Deadlines**

Cooperative Agreement for Years 1-5	
Signed 60 Days After the Award	November 25, 2024

Reporting Period	Deadline
Annual Service Plan (ASP)	
October 1, 2024 - September 30, 2025 - First Draft (Regional Centers)	January 24, 2025
October 1, 2024 - September 30, 2025 – Updates	February 28, 2025
October 1, 2024 - September 30, 2025 - First Draft (Content Centers and the National Center)	February 28, 2025
Draft Year 1 Budget	
October 1, 2024 – September 30, 2025	January 24, 2025
Updated Indirect Cost Agreement(s), if applicable	
October 1, 2024 – September 30, 2025	January 24, 2025
Draft Communications & Dissemination Plan	
October 1, 2024 – September 30, 2025	January 24, 2025
Partnership Agreements & MOUs	
October 1, 2024 – September 30, 2025	December 27, 2024
Year 1 Annual Performance Report & Federal Financial Report	
October 1, 2024– April 30, 2025	May 30, 2025
Quarterly Progress Report	
April 1, 2025- June 30, 2025	July 15, 2025
July 1, 2025 - September 30, 2025	October 15, 2025

Updated 2025-02-10

Year 1 Annual Evaluation Report	
Reporting Period	Deadline
October 1, 2024 – September 30, 2025	December 31, 2025
REL-CC Joint Needs Sensing	
REL-CC Joint Needs Sensing Memo Update	Spring 2025

Note: Year 1 reporting deadlines are accurate as of October 2024. Deadlines are subject to change pending notification from the Program Office.



RE: Partnership agreements and MOUs

From Lembo, Elisabeth <Elisabeth.Lembo@ed.gov>

Date Fri 2/14/2025 4:59 PM

To Jennifer Esswein <jennifer.esswein@ednw.org>; Cortney Rowland <Cortney.Rowland@ednw.org>

Cc Lymaris Santana <Lymaris.Santana@ednw.org>

<<EXTERNAL>>

Hi Jen,

Thanks for following up on this and I apologize for this week's delay.

Confirming review of full Advisory Board is completed, and that you have my approval to move forward.

Please keep me posted if you have any questions!

Best,

Liz

From: Jennifer Esswein <jennifer.esswein@ednw.org>

Sent: Friday, February 7, 2025 3:47 PM

To: Cortney Rowland <Cortney.Rowland@ednw.org>; Lembo, Elisabeth <Elisabeth.Lembo@ed.gov>

Cc: Lymaris Santana <Lymaris.Santana@ednw.org>

Subject: Re: Partnership agreements and MOUs

CAUTION: This email originated from outside of the organization. Do not click links or open attachments unless you recognize the sender and know the content is safe.

Hi Liz,

I hope you're doing well. We wanted to check in with you about any feedback you may have on our advisory board document (attached, and please see message below). We were hoping to move forward with contacting states with the names but wanted to check with you first. Apologies if I missed any feedback.

Thank you!

Jen

Jennifer Esswein, PhD

Director, Applied Research and Systems Improvement

c 614.361.7660

o 503.275.0651

a 1417 NW Everett St, Suite 310, Portland, OR 97209

ED 001869



From: Cortney Rowland <Cortney.Rowland@ednw.org>
Sent: Thursday, January 9, 2025 2:30 PM
To: Lembo, Elisabeth <Elisabeth.Lembo@ed.gov>
Cc: Lymaris Santana <Lymaris.Santana@ednw.org>; Jennifer Esswein <jennifer.esswein@ednw.org>
Subject: RE: Partnership agreements and MOUs

Hi Liz,

Happy new year! Hope you had a terrific break. I imagine things are quite busy on your end right now so hope you're all hanging in there. Apologies for the delay in responding to this – it's been so busy with holidays, this week's snow days, and the busy-ness of the new year. But things are up and running and we're excited.

Thank you for sending a link to the Resources and sample agreements. I think the partnership agreement we will focus on most right now is the one with RELNW, and there may be others as we get the ASP fine-tuned (p.s. do you have a new date on when the template for that will be sent?). It looks like in the timeline document, you all were looking for those agreements to be in place by 12/27, so we will prioritize getting that in place right away. We've had one discussion with RELNW already and will follow-up with them to establish the agreement.

Attached is our working document for the Advisory Board – this is just internal; we haven't shared this with anyone yet. We're very focused on keeping our state partners/contacts focused on scoping out projects right now. Those are all getting much closer so we're thinking soon we'll follow up with our states about their recommendations for Advisory Board members, using those on this list as a starting place. We're also developing a 1-pager about the Advisory Board to share with states and others so it's clear the composition, focus, and goals of the Board. We're feeling pretty good about this list but of course welcome any thoughts/feedback you have, and please let us know if how we're proceeding works OK on your end.

Last, would it be possible to get a monthly check-in with you established, even if it's just 30 minutes? And we can reschedule and/or cancel when not necessary. Let us know how that sounds and if that's something you want us to schedule or if you'd prefer to schedule.

Thanks!
Cortney

From: Lembo, Elisabeth <Elisabeth.Lembo@ed.gov>
Sent: Friday, December 20, 2024 2:11 PM
To: Jennifer Esswein <jennifer.esswein@ednw.org>
Cc: Cortney Rowland <Cortney.Rowland@ednw.org>; Lymaris Santana <Lymaris.Santana@ednw.org>
Subject: RE: Partnership agreements and MOUs

ED 001870

<<EXTERNAL>>

Hi Jen,

First, my sincere apologies for the delayed reply as I've been gathering information. I hope this is helpful and please don't hesitate to let me know if you have any questions.

Partnership Agreement Template: Sample partnership agreements/MOUs have been uploaded to the External SharePoint [Resources](#) Folder. Danielle shared some additional context, which I hope offers clarity and please let us know if you have questions:

To start for Year One, we're asking that you have agreements for any partners that you suggested in your application -- partners that you've already contemplated and have talked with about partnering and having sustained engagement. These are the partners we're referring to in the 90 day deadline for Regional Centers. This also includes partnership agreements with the RELS for their regions. This does *not* have to include any additional partners or subs. Specifically, anyone you're paying with your grant funds are *not* considered partners. Rather, partners would be other centers who are contributing resources to your work so that you might come together with another center and jointly work on something, or those you want to regularly have meetings with that to share information. As an example, your partnership agreement could indicate "We're going to meet every quarter and share information about what we're doing to identify potential opportunities to work together." It could be that level of partnership agreement that we're looking for right now, but you don't have to have thought about the entire unit. To this point, for centers that you could potentially partner with, you can always add more later, and as you're working on your ASP. We recognize that this is an evolving landscape as you figure out who your partners will be. The ones that we're asking for now are just the ones that you have already contemplated because they were in your application.

Re: Advisory Boards:

Would you be able to share a brief proposed list that your team is starting to think about? Once you've done that, our team will be able to offer TA to provide input on the composition and membership to ensure broad representation of stakeholders and interests, key partners or perspectives, that will assist with the work of the Center. We fully understand this will not be final version and might change!

Thanks, Jen.
Liz

From: Jennifer Esswein <jennifer.esswein@ednw.org>

Sent: Tuesday, December 17, 2024 3:23 PM

To: Lembo, Elisabeth <Elisabeth.Lembo@ed.gov>

Cc: Cortney Rowland <Cortney.Rowland@ednw.org>; Lymaris Santana <Lymaris.Santana@ednw.org>

Subject: Partnership agreements and MOUs

CAUTION: This email originated from outside of the organization. Do not click links or open attachments unless you recognize the sender and know the content is safe.

Hi Liz,

ED 001871

Apologies in advance if I missed some guidance, but I was wondering if you could provide more detail about what's required for the partnerships agreements and MOUs that are due on December 27th?

We are also still working on formation of the advisory board. We've talked with our states about the requirement, but we have not chosen members. We would like more time to work with them on this. Is this also due along with the agreements and MOUs?

Thanks!
Jen

Jennifer Esswein, PhD

Director, Applied Research and Systems Improvement

c 614.361.7660

o 503.275.0651

a 1417 NW Everett St, Suite 310, Portland, OR 97209

educationnorthwest.org



Attachments: image001.png

From: Lembo, Elisabeth <Elisabeth.Lembo@ed.gov>
Sent: Friday, February 14, 2025 1:59 PM
To: Jennifer Esswein <jennifer.esswein@ednw.org>; Cortney Rowland <Cortney.Rowland@ednw.org>
Cc: Lymaris Santana <Lymaris.Santana@ednw.org>
Subject: RE: Partnership agreements and MOUs

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Thank you!

Jen

Jennifer Esswein, PhD

Director, Applied Research and Systems Improvement

☎ 614.361.7660

📞 503.275.0651

ED 001873

a 1417 NW Everett St, Suite 310, Portland, OR 97209

educationnorthwest.org



From: Cortney Rowland <Cortney.Rowland@ednw.org>

Sent: Thursday, January 9, 2025 2:30 PM

To: Lembo, Elisabeth <Elisabeth.Lembo@ed.gov>

Cc: Lymaris Santana <Lymaris.Santana@ednw.org>; Jennifer Esswein <jennifer.esswein@ednw.org>

Subject: RE: Partnership agreements and MOUs

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Last, would it be possible to get a monthly check-in with you established, even if it's just 30 minutes? And we can reschedule and/or cancel when not necessary. Let us know how that

ED 001874

sounds and if that's something you want us to schedule or if you'd prefer to schedule.

Thanks!
Cortney

From: Lembo, Elisabeth <Elisabeth.Lembo@ed.gov>
Sent: Friday, December 20, 2024 2:11 PM
To: Jennifer Esswein <jennifer.esswein@ednw.org>
Cc: Cortney Rowland <Cortney.Rowland@ednw.org>; Lymaris Santana <Lymaris.Santana@ednw.org>
Subject: RE: Partnership agreements and MOUs

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To: Lembo, Elisabeth <Elisabeth.Lembo@ed.gov>

Cc: Cortney Rowland <Cortney.Rowland@ednw.org>; Lymaris Santana <Lymaris.Santana@ednw.org>

Subject: Partnership agreements and MOUs

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Jen

Jennifer Esswein, PhD

Director, Applied Research and Systems Improvement

☎ 614.361.7660

📞 503.275.0651

📍 1417 NW Everett St, Suite 310, Portland, OR 97209

educationnorthwest.org





Outlook

Re: ASP

From Lembo, Elisabeth <Elisabeth.Lembo@ed.gov>

Date Fri 2/14/2025 4:57 PM

To Jennifer Esswein <jennifer.esswein@ednw.org>; Cortney Rowland <Cortney.Rowland@ednw.org>

Cc Daley, Michelle <Michelle.Daley@ed.gov>

<<EXTERNAL>>

Dear Jen and Cortney,

We know that many States are eager to begin work and have expressed the need to get projects underway as soon as possible. To ensure that your Center is able to provide necessary and timely services, Directors may request **provisional approval** to begin work on time sensitive projects proposed in your draft Annual Service Plan (ASP) while we continue reviewing your full ASP.

If your Center needs to start work on certain projects prior to March 14, 2025, due to State requests or pressing needs, please email your request for provisional approval with the following information:

1. **Project title(s)**
2. **Proposed start date(s)**

I will prioritize review of those specific activities and provide timely notification of provisional decisions so you may move forward, as appropriate, without delays. All other projects proposed in the ASP will be reviewed within the previously communicated timeline. Please let me know if you have any questions.

Best,
Liz

Elisabeth T. Lembo
Program and Grantee Support Services
U.S. Department of Education

Email: elisabeth.lembo@ed.gov
Phone Number: (202) 453-5823

Attachments: Outlook-A picture .png, R11 ASP Simple Format 2.17.25.xlsx

From: Jennifer Esswein <jennifer.esswein@ednw.org>
Sent: Tuesday, February 18, 2025 11:00 AM
To: Lembo, Elisabeth <Elisabeth.Lembo@ed.gov>
Cc: Daley, Michelle <Michelle.Daley@ed.gov>; Cortney Rowland <Cortney.Rowland@ednw.org>
Subject: Re: ASP

Hi Liz,

Thank you for the opportunity for advanced approval of our projects. We've been working closely with our states to develop the scopes, and they are all wanting to move forward as quickly as possible.

Our ASP draft has been uploaded to SharePoint and is also attached to this email: [R11 ASP Simple Format 2.17.25.xlsx](#). Below is the list of all our proposed project titles as well as identification of the ones that we'd like to begin as soon as possible. We are still on track to submit a final version on 2/28/25.

Thank you, and let us know if you have any questions,

Northwest CC Team

	Title	Seeking approval to start as soon as possible
1	Building Cohesion Around MTSS/RTI in Alaska	
2	Career and Technical Education in Alaska	
3	Teacher Recruitment and Retention in Alaska	X
4	Principles of Teaching in Idaho Workgroup	
5	Data Governance at the Idaho Department of Education	
6	Program Efficiency at the Idaho Department of Education	X
7	Identification of Comprehensive Schools for Improvement in Idaho	
8	Graduate Profiles in Montana	

9	Strengthening the Educator Workforce in Montana	
10	Strengthening the Instructional Core in Montana	X
11	Strategic Planning Alignment to Support Meeting the Three Pillars and Accountability Reform in Oregon	X
12	Washington Learning Standards Implementation	X
13	Native Education Network	X

Jennifer Esswein, PhD

Director, Research and Evaluation

c 614.361.7660

o 503.275.0651

educationnorthwest.org**From:** Lembo, Elisabeth <Elisabeth.Lembo@ed.gov>**Sent:** Friday, February 14, 2025 4:57 PM**To:** Jennifer Esswein <jennifer.esswein@ednw.org>; Cortney Rowland <Cortney.Rowland@ednw.org>**Cc:** Daley, Michelle <Michelle.Daley@ed.gov>**Subject:** Re: ASP

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